

## Understanding Perceptions of Southwark Town Centres

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# Research Approach

Southwark Council engaged urban research specialists ROI Team to carry out two linked projects to explore the health of 5 town centres in the Borough and in particular the impact of Betting and Payday Loan shops on the environment and offer in these town centres

The town centres are :

- Borough / Bankside area
- Camberwell
- Canada Water (including Surrey Quays shopping centre)
- Peckham
- Walworth (including Elephant shopping centre)

ROI Team have now completed the two projects :

- *Survey of visitors / shoppers found in five Southwark town centres*

Objective : Understanding of shopping, leisure and spending habits and perceptions and wishes of visitors

- *Depth Interviews with town centre visitors around personal perceptions of Betting and Payday Loan Shops*

Objective : Understanding of the views of Southwark residents and citizens

We interviewed a balance of users and non-users of these shops

# Research Approach : Visitor survey in 5 Southwark town centres

Interviewing across 2 weeks w/c Feb 10<sup>th</sup> and w/c Feb 17<sup>th</sup>.  
Weather during the first week was consistently unfriendly

Interviewing face to face using a pre- agreed questionnaire of duration about 6 minutes

1st Week			2nd Week			
Thurs 13th	Fri 14th	Sat 15th	Wed 19th	Thurs 20th	Fri 21st	Sat 22nd
Walworth	Walworth	Walworth	Camberwell	Borough Area / Bankside	Peckham	Borough Area / Bankside
Camberwell	Peckham	Peckham		Canada Water / Surrey Quays	Canada Water / Surrey Quays	Canada Water / Surrey Quays
						Camberwell

	Interviews targeted	Interviews achieved
Walworth	200	211
Camberwell	150	160
Peckham	150	160
Borough	200	205
Canada Water	150	175
<b>TOTAL</b>	<b>850</b>	<b>app 910</b>

We aimed to harvest at least 40% of sample from Saturday interviews to provide potential for a weekday / weekend analysis  
This was successfully achieved everywhere except in Camberwell



# Interview locations

Town centre	Locations
Borough Area	Borough Market Borough High Street / Union Street Bankside
Camberwell	Corner of Camberwell Green Exits from Butterfly Walk shopping centre Denmark Hill
Canada Water	Library Surrey Quays shopping centre Lower Road
Peckham	Town Square Rye Lane / Hanover Park Peckham Rye Station
Walworth	Elephant shopping centre Walworth Road / Browning Street Walworth Road / Liverpool Grove



At all town centres we achieved at least 25% of the sample at each location. In some centres we have noted significant differences between locations  
 In Camberwell, owing to local factors, we were not able to achieve 25% of sample at the Denmark Hill location

# Questionnaire

**Southwark Town Centres Questionnaire:** Can you spare a moment to tell me about your experience of visiting this town centre today? The survey is confidential and will only take 5 minutes.

Interviewer Name:

Location:

Date+Time:

		Respondent 1	Respondent 2	Respondent 3
1. What is your main purpose for visiting this town centre today? <i>(single answer)</i>	Shopping in stores	a	a	a
	Shopping in a supermarket	b	b	b
	Shopping in the Market	c	c	c
	I live in this area	d	d	d
	Work/Business	e	e	e
	Eating/Drinking	f	f	f
	Leisure (eg. gym, cinema etc)	g	g	g
	Access to transport	h	h	h
	No particular reason	i	i	i
	Other (please specify)			
2. Apart from your main purpose for coming today, what else, if anything, will you be doing here today? <i>(max. 2 answers)</i>	Shopping in stores	a	a	a
	Shopping in the supermarket	b	b	b
	Shopping in the Market	c	c	c
	I live in this area	d	d	d
	Work/Business	e	e	e
	Eating/Drinking Out	f	f	f
	Leisure (eg. gym, cinema etc)	g	g	g
	Access to transport	h	h	h
	No particular reason	i	i	i
	Other (please specify)			
3. How often do you visit this town centre during the DAYTIME? <i>(single answer)</i>	Every day	a	a	a
	Weekly or more often	b	b	b
	2 or 3 times a month	c	c	c
	Monthly	d	d	d
	Once every few months	e	e	e
	Less often	f	f	f
	First visit	g	g	g
	Don't know/varies	h	h	h
4. How often do you visit this town centre during the EVENING? (ie after 6pm) <i>(single answer)</i>	Every day	a	a	a
	Weekly or more often	b	b	b
	2 or 3 times a month	c	c	c
	Monthly	d	d	d
	Once every few months	e	e	e
	Less often	f	f	f
	First visit	g	g	g
	Don't know/varies	h	h	h
5. What MOST attracts you to this town centre? <i>(single answer)</i>	Proximity / Convenience	a	a	a
	Safety	b	b	b
	Attractive Environment	c	c	c
	Ease of parking	d	d	d
	Choice of shops	e	e	e
	Range of places to Eat/Drink	f	f	f
	Nothing particular	g	g	g
	A specific retailer / shop (which one?)			
	Other (please specify)			
6. In which of these places have you or will you be spending money today in this area? <i>(select as many as apply)</i>	Food shops	a	a	a
	Non food shops	b	b	b
	High street services	c	c	c
	Pub or bar	d	d	d
	Cafe or coffee shop	e	e	e
	Restaurant / Take away	f	f	f
	Supermarkets / General stores	g	g	g
	Not spending today	h	h	h
	Other (please specify)			
7. By the time you leave this area today how much do you expect to spend?	Nothing	a	a	a
	Less than £10	b	b	b
	£10 to £20	c	c	c
	£20 to £30	d	d	d
	£30 to £50	e	e	e
	More than £50	f	f	f

# Questionnaire

		Respondent 1	Respondent 2	Respondent 3
8. How did you travel here today?(Last form of travel)	Car	a	a	a
	Bus	b	b	b
	Taxi	c	c	c
	Tube	d	d	d
	Train	e	e	e
	Bicycle	f	f	f
	Walked	g	g	g
	Other (please specify)			
9. Of the following facilities, do you think there should be MORE/LESS or ABOUT THE SAME in this town centre?	Food shopping	M L AR	M L AR	M L AR
	Non food shopping	M L AR	M L AR	M L AR
	High street services	M L AR	M L AR	M L AR
	Cafes and restaurants	M L AR	M L AR	M L AR
	Pubs and Bars	M L AR	M L AR	M L AR
	Hot food Takeaways	M L AR	M L AR	M L AR
	Betting Shops and Payday Loan Shops	M L AR	M L AR	M L AR
	Other (please specify)			
10. Which of the following things would persuade YOUR HOUSEHOLD to come more often to this town centre? (max. 3 answers)	More retailers	a	a	a
	More restaurants	b	b	b
	More pubs/bars/clubs	c	c	c
	More/better parking facilities	d	d	d
	More for families/children	e	e	e
	More public spaces for meeting/relaxing	f	f	f
	Better late shopping	g	g	g
	More police/safer streets	h	h	h
	Better public transport	i	i	i
	Cleaner streets	j	j	j
	More leisure facilities	k	k	k
	Nothing	l	l	l
Other (please specify)				
11. What do you most dislike about this town centre? (Open Question)				
12. How often do you visit Betting Shops? (single answer)	Every day	a	a	a
	Weekly of more often	b	b	b
	Monthly	c	c	c
	Occasionally	d	d	d
	Never	e	e	e
	It varies	f	f	f
13. When did you last visit one and what did you do there? (Open Question)				
14. How often do you visit Payday Loan Shops? (single answer)	Every day	a	a	a
	Weekly of more often	b	b	b
	Monthly	c	c	c
	Occasionally	d	d	d
	Never	e	e	e
	It varies	f	f	f
15. When did you last visit one and what did you do there? (Open Question)				

		Respondent 1	Respondent 2	Respondent 3	
16. How far do you agree with the following statements about the presence of Betting Shops in this town centre? (Rating question) 1 disagree strongly – 5 agree strongly	People less likely to visit this town centre because of them	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They provide a meeting place for local people	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They reduce the diversity of shops in this town centre	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They make the town centre less attractive	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They provide a valuable service for local people	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They attract anti-social behaviour	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They can affect people's health, quality of life or well being	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	They attract the wrong type of people	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	17. How far do you agree with the following statements about the presence of Payday Loan Shops in this town centre? (Rating question) 1 disagree strongly – 5 agree strongly	People less likely to visit this town centre because of them	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
		They provide a meeting place for local people	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
They reduce the diversity of shops in this town centre		1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
They make the town centre less attractive		1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
They provide a valuable service for local people		1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
They attract anti-social behaviour		1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
They can affect people's health, quality of life or well being		1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
They attract the wrong type of people		1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
18. How many adults and children live in your home?		(record numbers) Adults 18+ / 15 - 17 year olds/ Children 14 and under	/ /	/ /	/ /
		19. What age group do you fall into? [don't interview under 18]	18-24 25-34 35-44 45-54 55-64 65+	18-24 25-34 35-44 45-54 55-64 65+	18-24 25-34 35-44 45-54 55-64 65+
20. What is your employment status?	Full-time employed	a	a	a	
	Part-time employed	b	b	b	
	Self employed	c	c	c	
	Not employed	d	d	d	
	Homemaker	e	e	e	
	Student	f	f	f	
	Retired	g	g	g	
	Other	h	h	h	
21. What is your residential postcode please? [interviewer to check postcode with respondent]		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
	22. Gender [observe and select]	MALE FEMALE	MALE FEMALE	MALE FEMALE	

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## Executive summary

# Understanding Southwark town centres :

## Executive Summary

In spite of strong competition, Southwark's 5 town centres are fighting their corner strongly, attracting visitors from within and beyond the borough. Of Southwark's retail attractions, Borough Market has the widest draw, attracting visitors from around London and beyond the M25

In view of its scale and transport connections Walworth (which includes The Elephant shopping centre) is not punching its weight and is a missed opportunity

Southwark town centres' visitor profile is young compared to the London average, except in Camberwell

With the exception of the Borough/Bankside area, non-working people depress wealth levels. Across the 5 centres about a third of visitors are 'economically inactive' (against 15% in Borough/Bankside)

In terms of the Lifestyle profile, there is a huge presence of the most challenged *Urban Adversity* type who provide more than half the visitors to 4 of the 5 town centres. In all centres the proportion of *Rising Prosperity* types exceeds even London's average; if these young people stay in the borough they will provide a new generation of wealth and spending

'*Shopping in stores*' (not supermarkets) is still the main reason for visiting Southwark town centres, a great tribute to the resilience of these town centres. In the Borough/Bankside centre the stores offer is seen to be weak, with Borough Market the main draw



# Understanding Southwark town centres :

## Executive Summary

During daytime three quarters of people are visiting weekly or more often, a very healthy picture. But almost half of these visitors stay away entirely in the evening, a gaping commercial gap

There is a potential to develop a combined 'Town centres of Southwark retail and leisure network' with the 5 centres between them catering for all desires : Borough/Bankside for coffee shops and market; Canada Water for supermarket and national fascias; Walworth for 'food shops'; Peckham for bargain shopping, and so on

Spend in the town centres is middling, with averages of £20 for weekday and £28 for Saturdays. Sadly Peckham and Camberwell, with abundant wealthy residents in their hinterland, are missing out on the 'weekend boost' factor. With a typical weekend premium in these centres the Saturday average would creep over £30

For travel preferences, bus and walking are dominant means of arrival. Walworth is currently very much a micro-local centre with as many as half of visitors arriving on foot

In Canada Water there is a feeling of discontent with the environment and the offer. Half of visitors say they would come more often if there was a broader shopping offer

Of Southwark visitors about 15% say they have ever used a Betting shop, and about 5% have used a Payday Loan shop

Overall there is satisfaction with the level of provision for all shopping and F&B classes, though with about one in 5 perceiving an oversupply of hot food take-aways. But there is a clear view in every centre that there are too many Betting and Payday Loan shops, and their number should be reduced

# Survey of visitors / shoppers found in five Southwark Town Centres

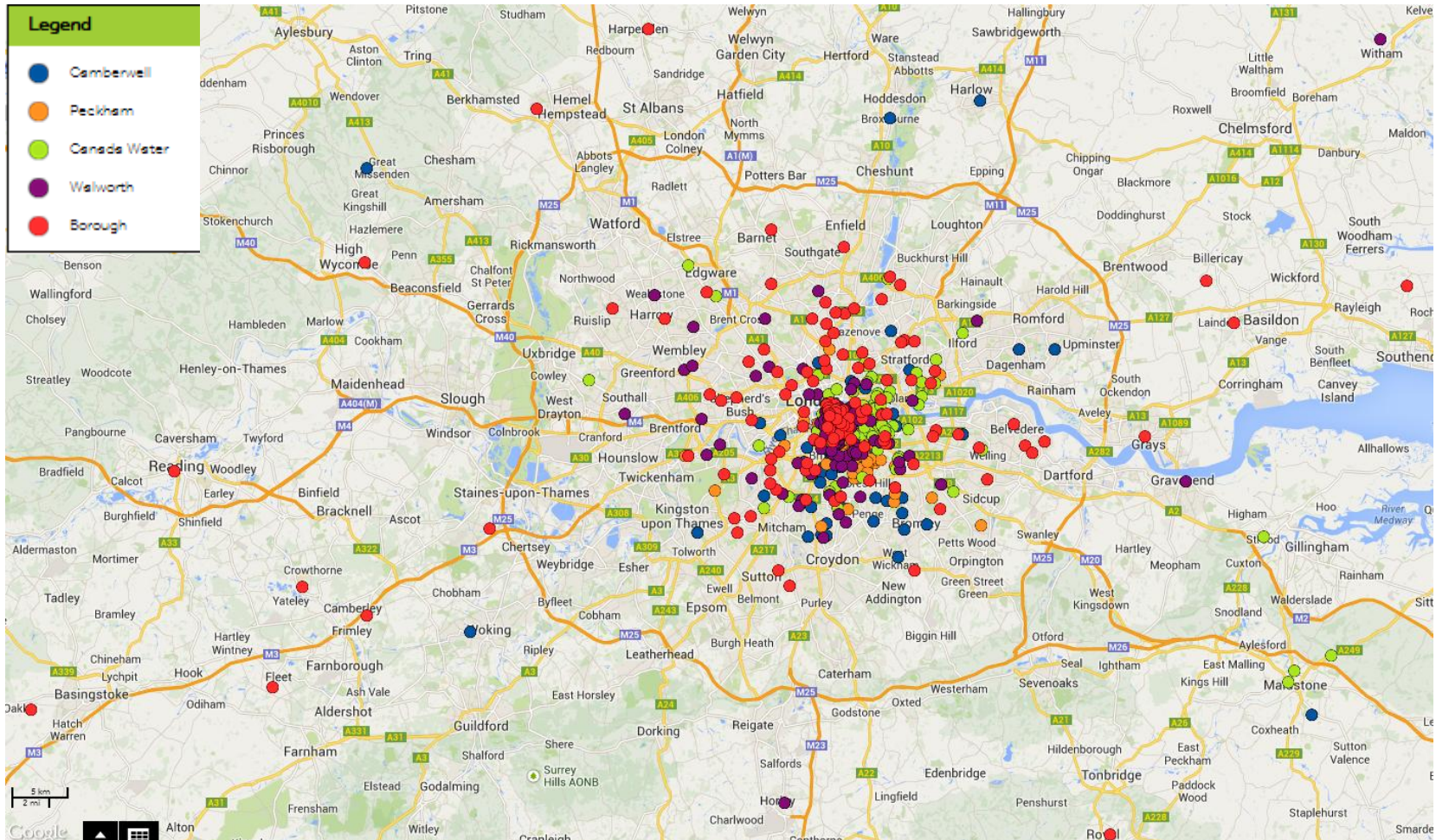
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## Visitor profiles

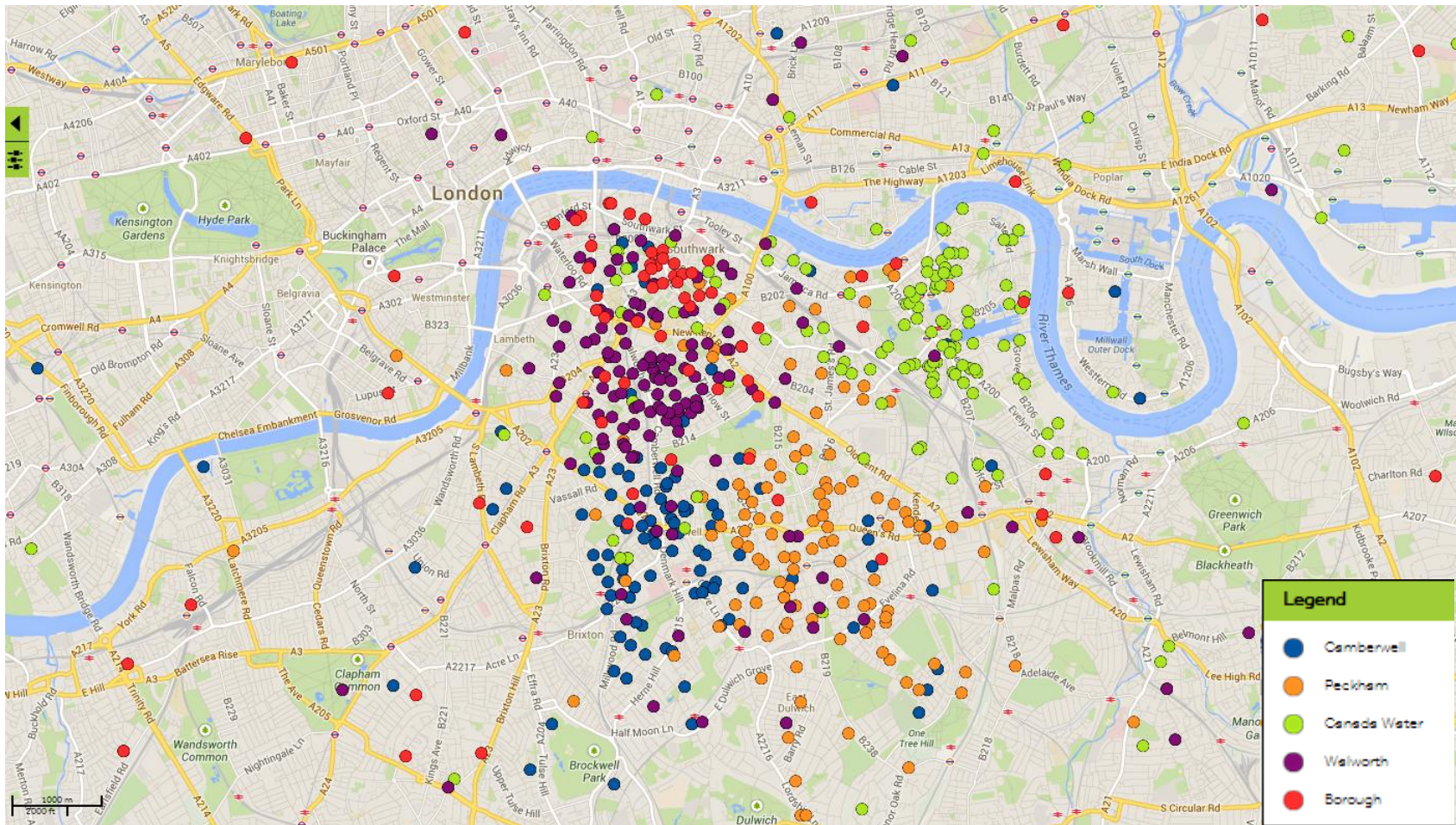
# Distribution of Southwark visitors by residence

The majority of people visiting Southwark's town centres live within the North/South Circular. That said, it can be seen that people travel from around the home counties to visit the Borough/Bankside area. Canada Water too draws quite strongly to the NE along the Jubilee Line



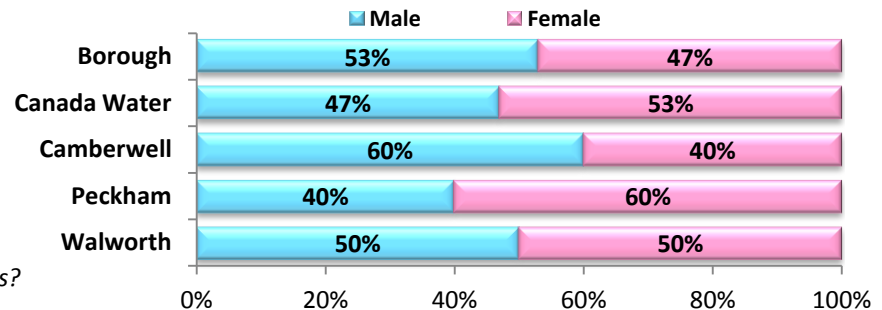
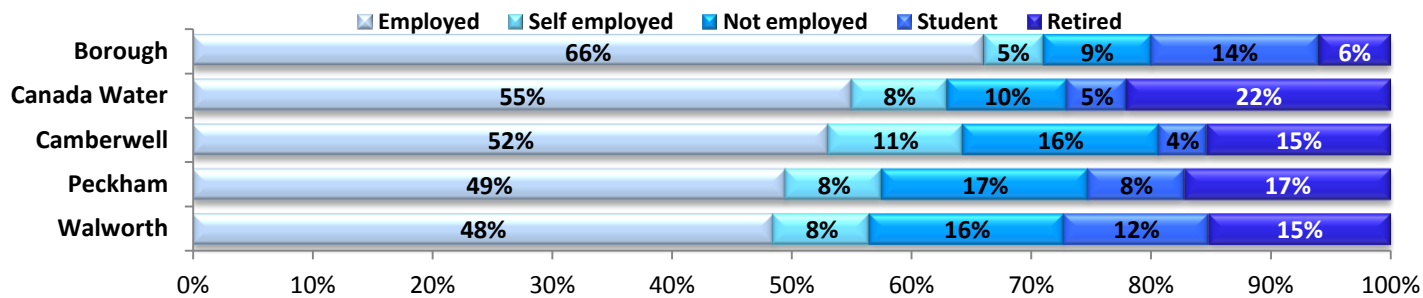
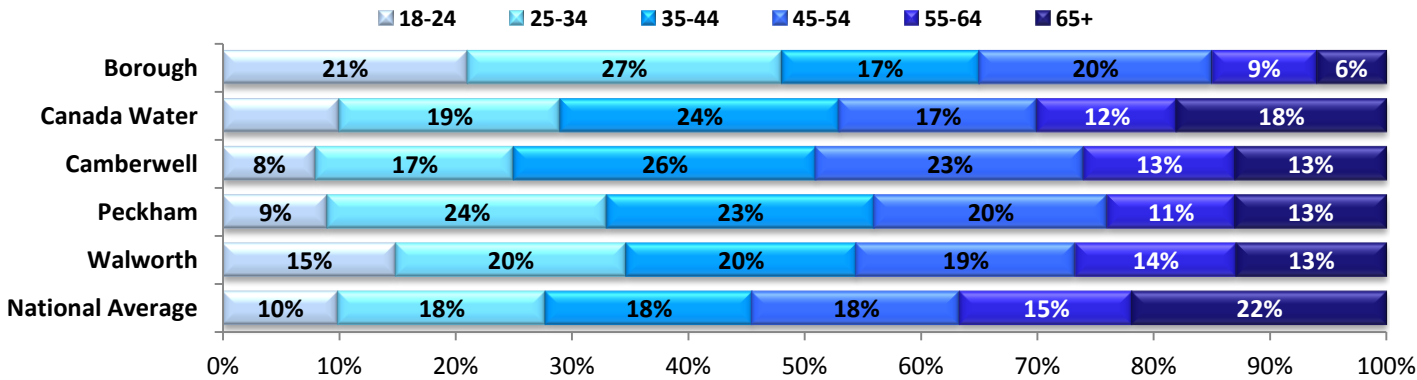
# Distribution of local respondents

All 5 Southwark town centres have a good local draw. It can be seen that Peckham draws quite strongly to the SE, whilst Canada Water has a strong hinterland in the Surrey Quays neighbourhoods. Camberwell's catchment is rather dispersed, whereas Walworth (including E&C) recruits almost entirely on its doorstep. Borough/Bankside attracts visitors from all across central London



# Age, gender and employment status

Southwark town centres have a young profile. In the Borough/Bankside area almost half of visitors are under 25 – compared with the national average of 28%. Unemployment is a feature on the traditional High Streets of Camberwell, Peckham, and Walworth



# Lifestyle profiling by ACORN

ACORN is a segmentation tool which categorises the UK's population by lifestyle types based on residential postcodes

ACORN segments households and neighbourhoods into 5 Categories, 17 Groups and 59 Types.

It provides detailed understanding of the consumer and lifestyle characteristics of people and places across the UK. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people.

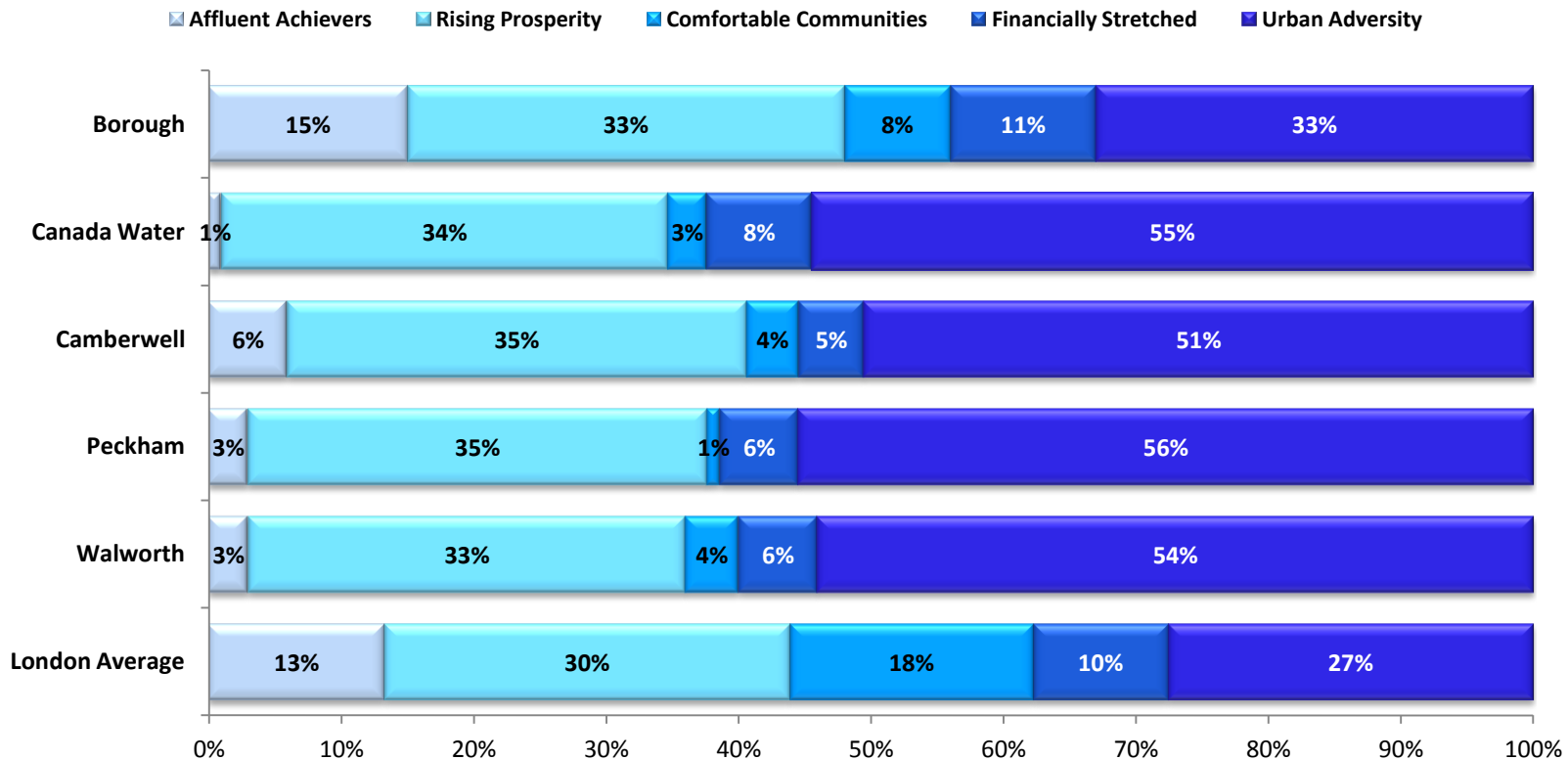
Category 1 Affluent Achievers			Category 2 Rising Prosperity		Category 3 Comfortable Communities				
Group A Lavish Lifestyles	Group B Executive Wealth	Group C Mature Money	Group D City Sophisticates	Group E Career Climbers	Group F Countryside Communities	Group G Successful Suburbs	Group H Steady Neighbourhoods	Group I Comfortable Seniors	Group J Starting Out
1.3%	12.1%	8.8%	3.2%	5.5%	6.5%	5.9%	8.4%	2.5%	4.0%

Category 4 Financially Stretched				Category 5 Urban Adversity		
Group K Student Life	Group L Modest Means	Group M Striving Families	Group N Poorer Pensioners	Group O Young Hardship	Group P Struggling Estates	Group Q Difficult Circumstances
2.5%	8.0%	8.6%	4.9%	5.0%	7.4%	4.6%

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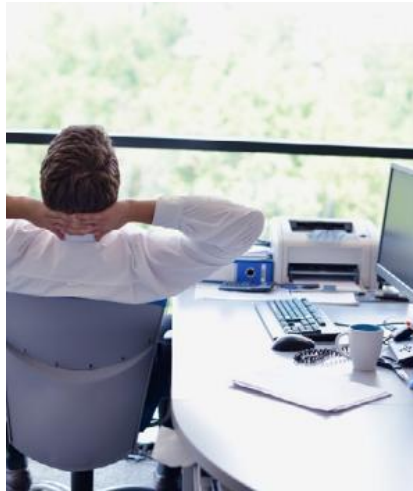
# Lifestyle profile

The feature in Southwark town centres is that the 'middle ground' types (*Comfortable Communities* and *Financially Stretched* types), who make up 28% of the London population are almost absent, in Peckham comprising just 7% of visitors. In their place we find a huge presence of the most challenged *Urban Adversity* type who provide more than half the visitors to 4 of our 5 town centres. The profile of the Borough/Bankside area matches the London average much more closely, with a much higher proportion of the wealthiest *Affluent Achievers* type. In all centres the proportion of *Rising Prosperity* types exceeds even London's average; if these young people stay in the borough they will be the next generation of *Affluent Achievers*





## Acorn Types: Affluent Achievers



These are some of the most financially successful people in the UK. They live in wealthy, high status rural, semi-rural and suburban areas of the country. These people live in large houses, which are usually detached with four or more bedrooms. High proportion of these people are very well educated and employed in managerial and professional occupations. Many can afford to spend freely and frequently and have also built up savings and investments. Usually confident with new technology and managing their finances, these people are established at the top of the social ladder. They are healthy, wealthy and confident consumers.

### Consumer 1 Affluent Achievers

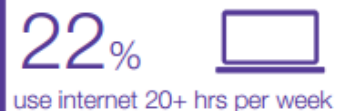


## Acorn Types: Rising Prosperity - *Dominant Visitor Type in Southwark Town Centres*



These are generally younger, well educated and mostly prosperous people living in our major towns and cities. Most are singles or couples, some yet to start a family, others with younger children. Often these are highly educated younger professionals moving up the career ladder. These people have a cosmopolitan outlook and enjoy their urban lifestyle. They like to eat out in restaurants, go to the theatre and cinema and make the most of the culture and nightlife of the big city.

### Consumer 2 Rising prosperity

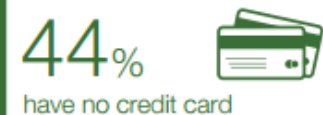


# Acorn Types: Comfortable Communities



Generally people in this category own their own home. Most houses are semi-detached or detached, overall of average value for the region. Incomes overall are average, some will earn more, the younger people a bit less than average. Those better established might have built up a degree of savings or investments. Employment is in a mix of professional and managerial, clerical and skilled occupations. Educational qualifications tend to be in line with the national average. Most people are comfortably off. They may not be very wealthy, but they have few major financial worries.

## Consumer 3 Comfortable Communities



## Acorn Types: Financially Stretched



Housing is often terraced or semi-detached, a mix of lower value owner occupied housing and homes rented from the council or housing associations, including social housing developments for the elderly and student term-time areas. There tends to be fewer traditional married couples than usual and more single parents, single, separated and divorced people than average. Incomes tend to be well below average. Although some have reasonably well paid jobs more people are in lower paid administrative, clerical, semi-skilled and manual jobs. Unemployment is above average as are the proportions of people claiming other benefits. People are less likely to engage with financial services and some will be having difficulties with debt. These people are less likely than average to use new technology or to shop online or research using the internet, although will use the internet socially.

### Consumer 4 Financially Stretched

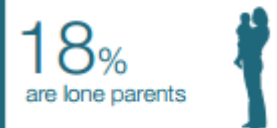


## Acorn Types: Urban Adversity - *Dominant Visitor Type in Southwark Town Centres*



These are the people who are finding life the hardest and experiencing the most difficult social and financial conditions. Household incomes are low, nearly always below the national average. The level of people having difficulties with debt or having been refused credit approaches double the national average. Levels of qualifications are low and those in work are likely to be employed in semi-skilled or unskilled occupations

### Consumer 5 Urban Adversity

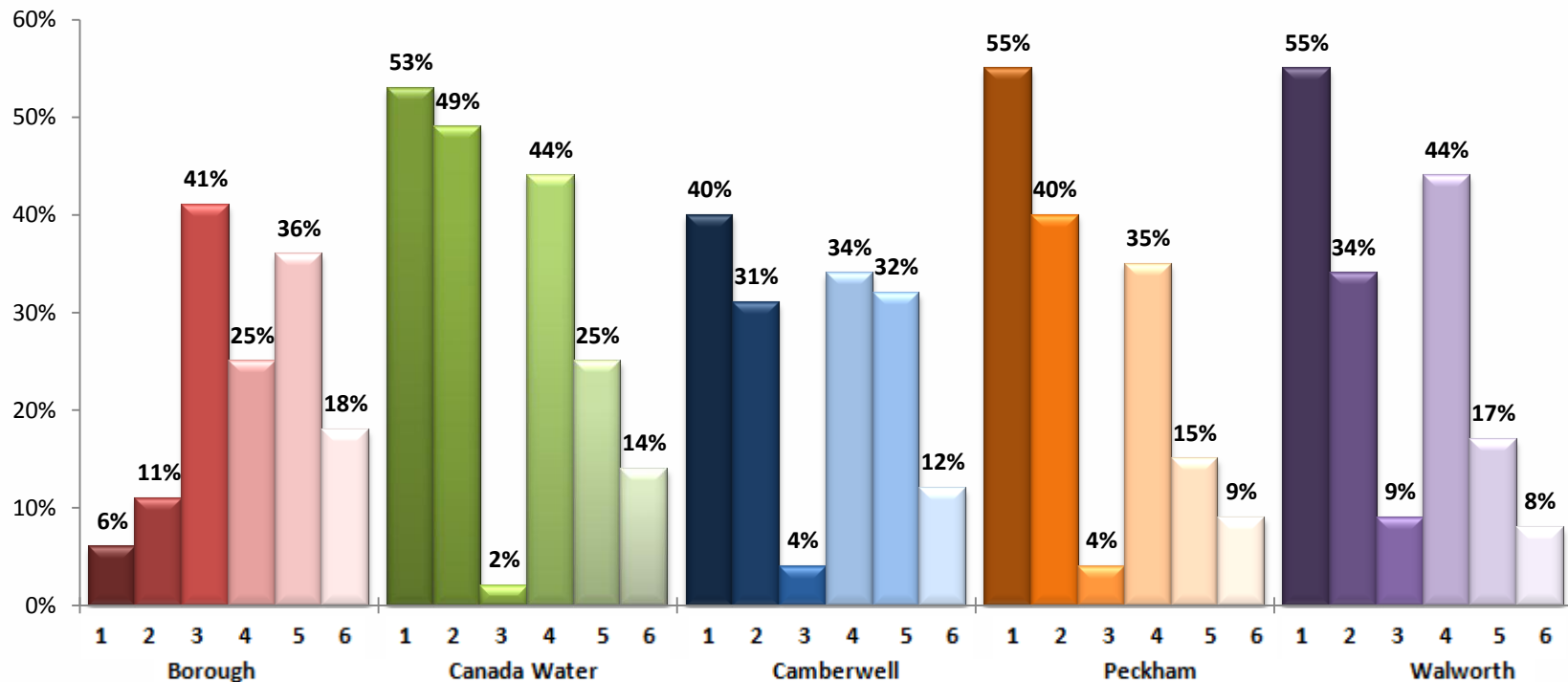


## Visitor Behaviour

# Purpose for visit

'Shopping in stores' is the dominant reason for coming to Southwark's town centres. With the exception of Borough Market the pull of markets is less of a factor than may be imagined, attracting less than 1 visitor in 10 - even on Walworth Road. In the Borough/Bankside area however, Borough Market outpoints all other shopping choices by more than 2 to 1

1. Shopping in Stores 2. Shopping in a Supermarket 3. Shopping in the market 4. I live in this area 5. Work/Business 6. Eating/Drinking



Q1. What is your main purpose for visiting here today? (single answer)

Q2. Apart from your main purpose for coming today, what else, if anything, will you be doing here today? (max 2 answers)

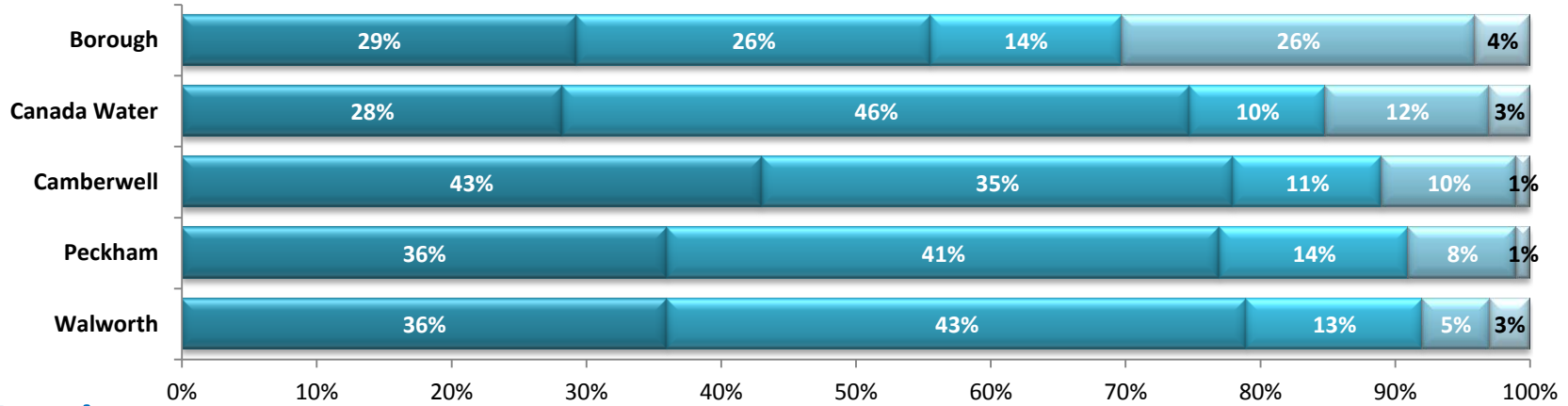
Base: 949

# Visiting habits during daytime and evening

Southwark town centres are frequently visited during daytime, with three quarters visiting weekly or more often. However for evenings the proportion falls to a third or less, with almost half avoiding evening visits altogether. Commercially this is a missed opportunity

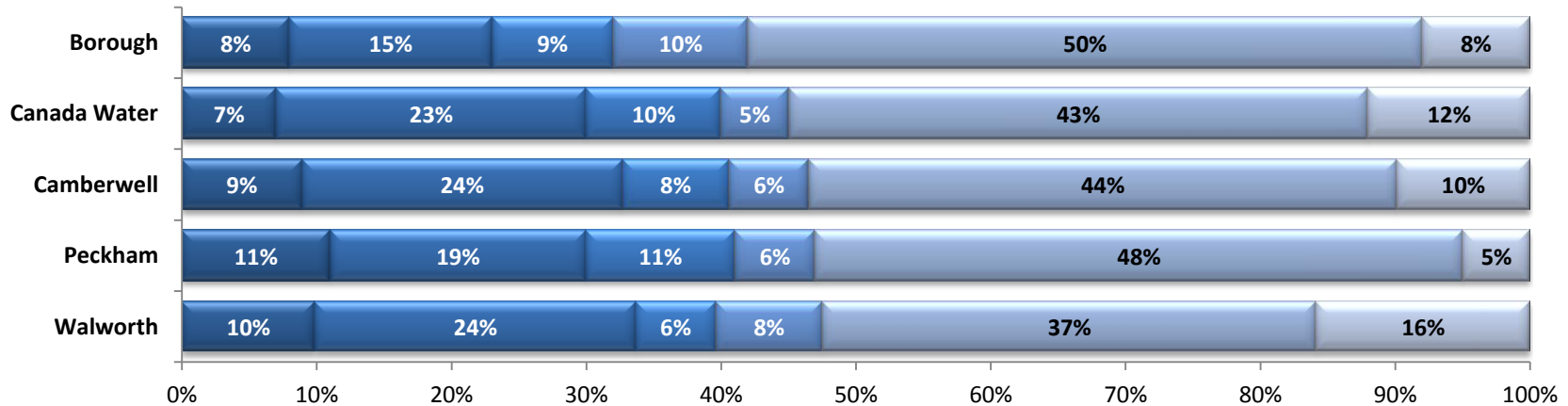
## Daytime

■ Everyday
 ■ Weekly or more often
 ■ Monthly or more often
 ■ Less than monthly
 ■ Don't know/varies



## Evening

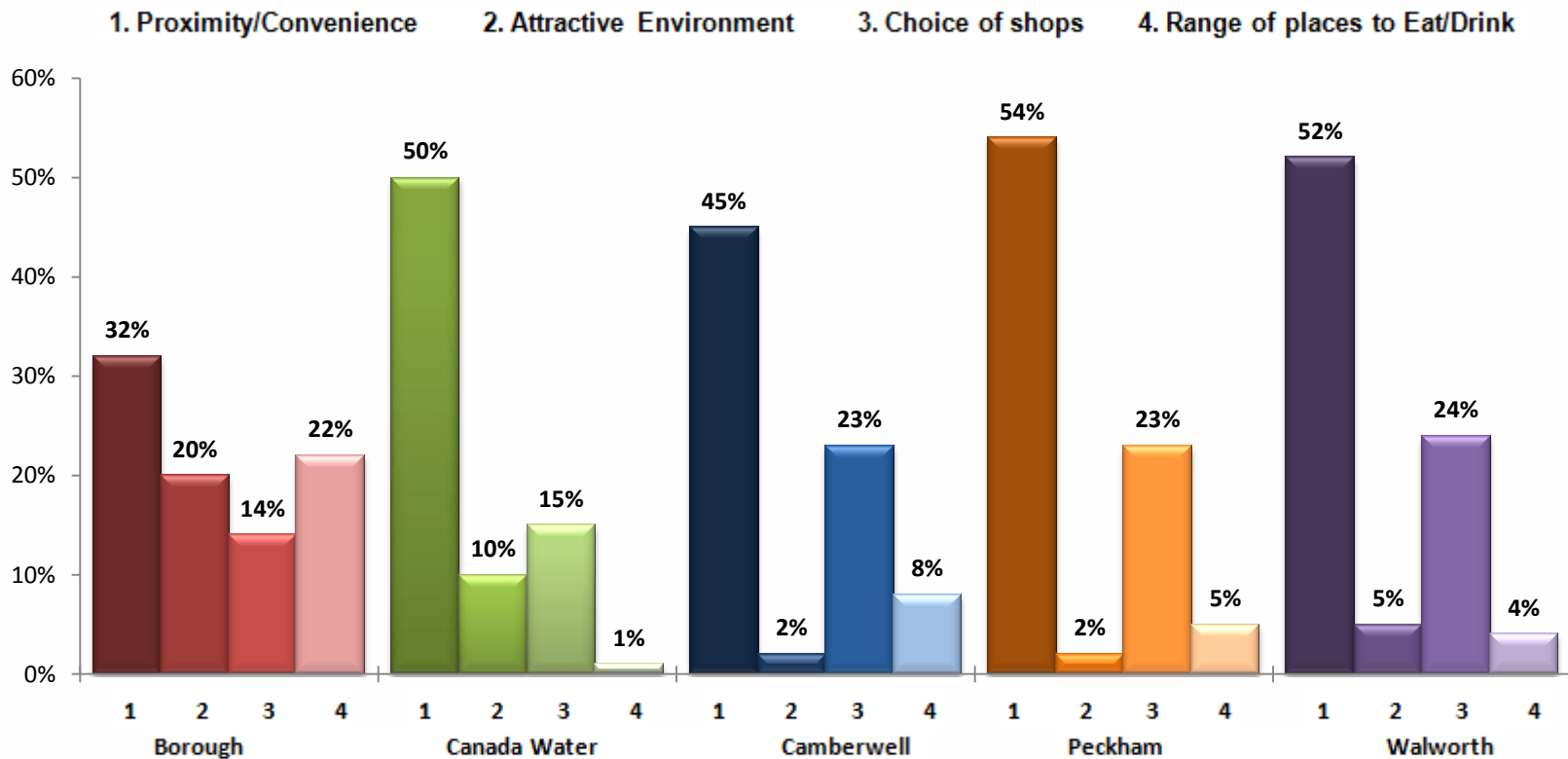
■ Everyday
 ■ Weekly or more often
 ■ Monthly or more often
 ■ Less than monthly
 ■ Less often&Never
 ■ Don't know/varies





# Attraction to Southwark town centres

Most visits to Southwark town centres are by default, with half of people going there simply because it's close. In Camberwell and Peckham 'Nothing Particular' was a popular answer for respondents. On the traditional High Streets 'Choice of shops' is still the attraction for a quarter of visitors – a tribute to the resilience of these retail-led High Streets

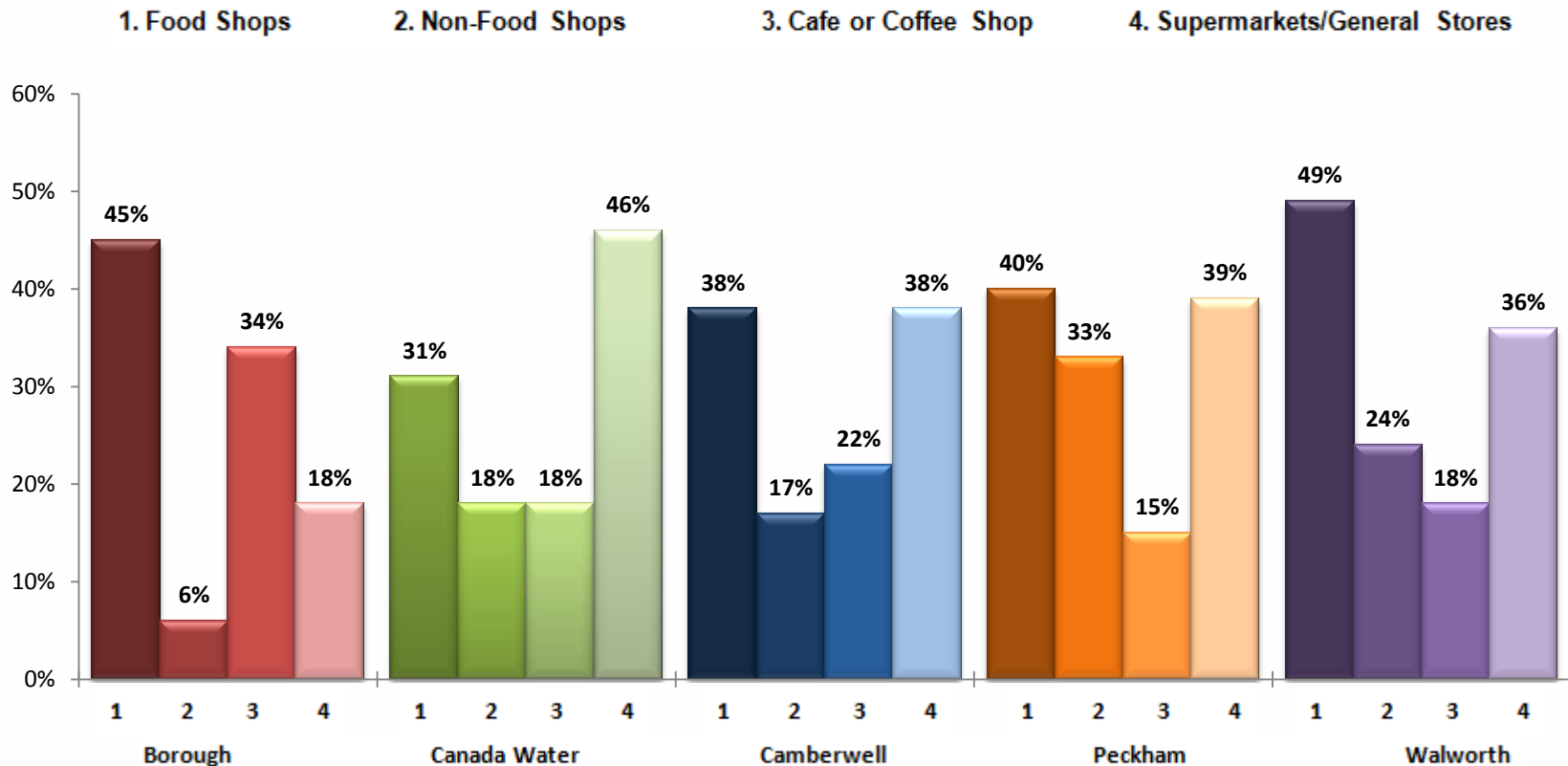


Q5. What most attracts you to this town centre? (single answer)

Base: 949

# Spending Habits

This graph shows how Southwark town centres combine to provide a full and balanced shopping offer: Borough/Bankside for coffee shops, supermarket in Canada Water, Walworth for 'food shops', and so on. And all centres offer something of everything

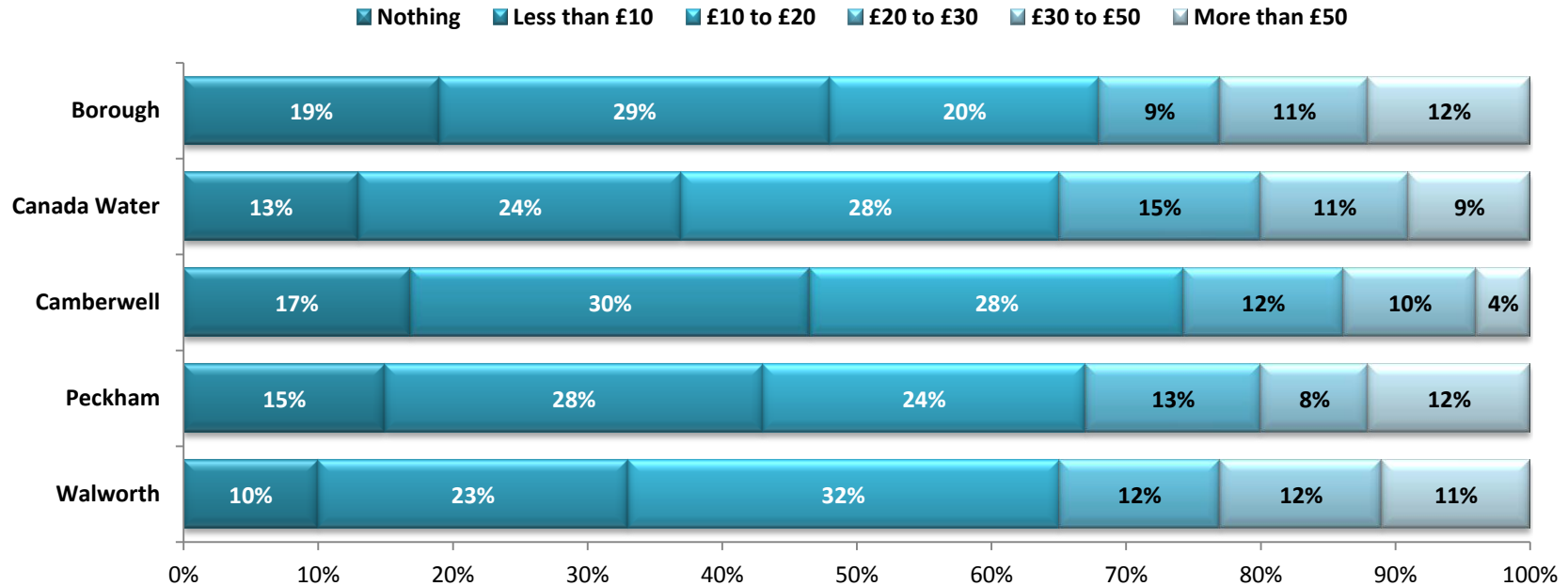


Q6. In which of these places have you or will you be spending money today in this area? (multiple)

Base: 949

# Spending Habits

In Southwark town centres spend is broadly in line with other UK High Streets that we know. At weekends average spend in Borough/Bankside, Canada Water, and Walworth is significantly higher. But Peckham and Camberwell are missing out on the 'weekend boost' as the wealthier visitors avoid their local High Street to spend elsewhere



	Average Spend Weekdays	Average Spend Weekends
<b>Borough</b>	£21	£30
<b>Canada Water</b>	£19	£33
<b>Camberwell</b>	£17	£21
<b>Peckham</b>	£22	£27
<b>Walworth</b>	£19	£31

Q7 By the time you leave this area today, how much do you expect to spend?

Base 949

# Spending habits by lifestyle type

From this slide we see that shopping spend in Southwark town centres is falling short of its potential because of modest spend by shoppers in the wealthier categories who may be using their local centres for top-up shopping. For example average spend by shoppers in the wealthy *Rising Prosperity* type is scarcely higher than for the benefits-dependent *Urban Adversity* type – but could be much higher

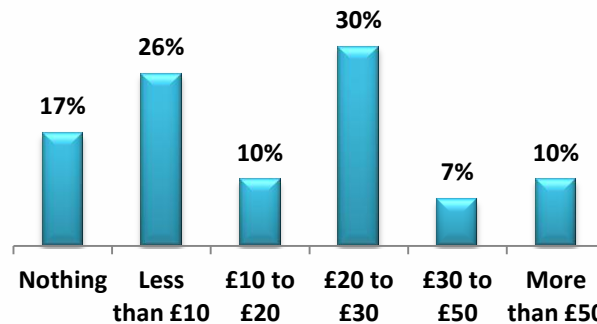
**Affluent Achievers**



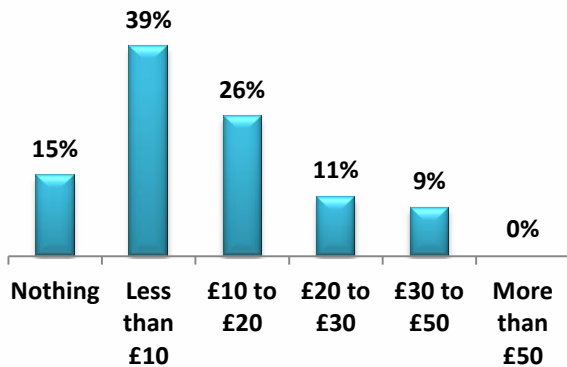
**Rising Prosperity**



**Comfortable Communities**



**Financially Stretched**



**Urban Adversity**



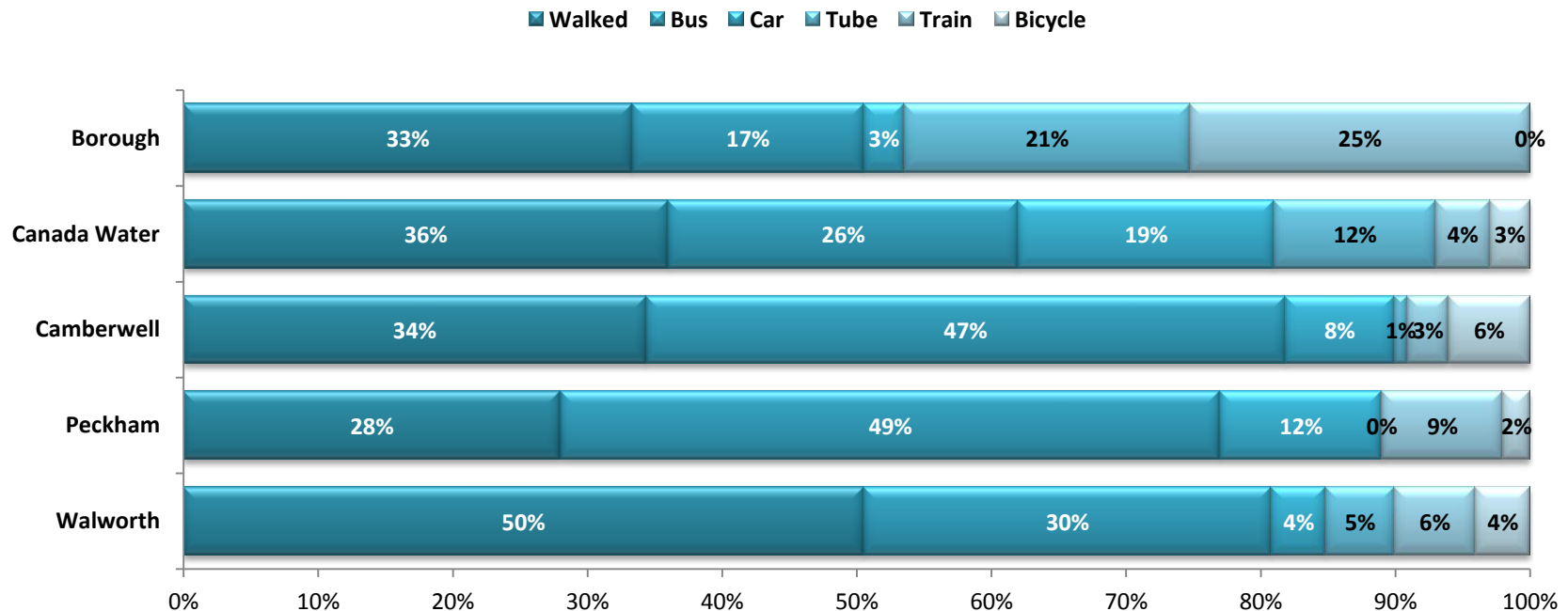
Q7 By the time you leave this area today, how much do you expect to spend?

Base 949



## Means of travel

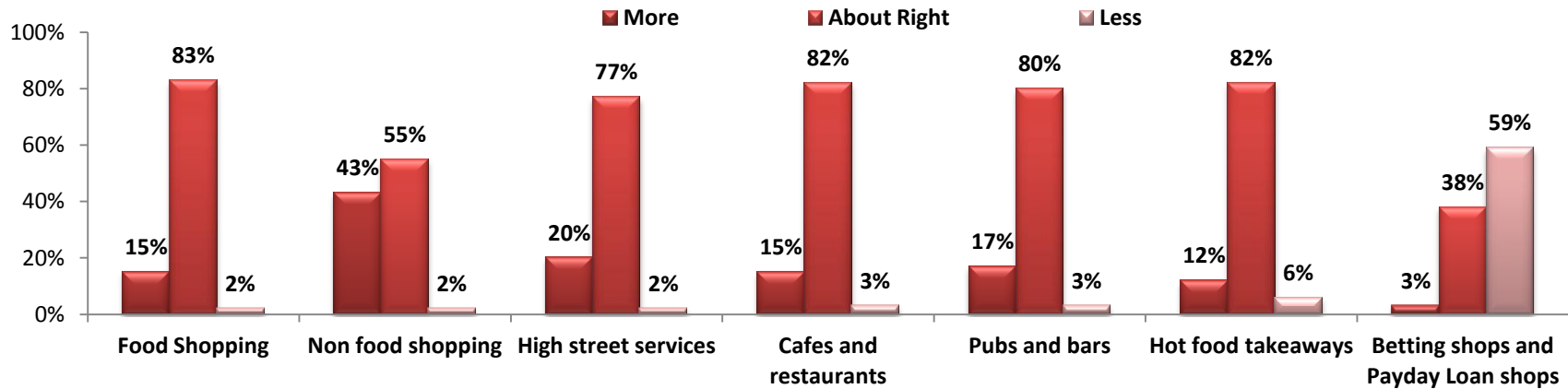
For all Southwark town centres arrivals by bus and on foot are dominant. Exactly half of visitors to Walworth have walked, with very nearly half arriving to both Camberwell and Peckham by bus. Peckham Rye station is not really a gateway in the way that London Bridge station is for the Borough/Bankside area. Travel by tube is nothing like so important, significant only for Borough / Bankside and Canada Water



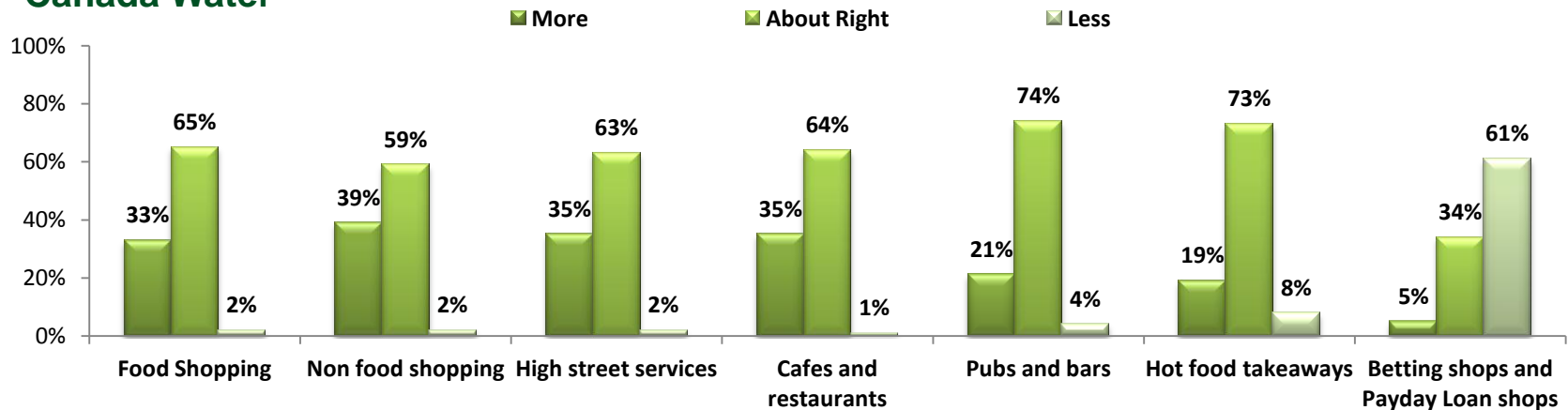
# Appetite for facilities

In all town centres there is a consensus that retail provision is 'about right' for all classes. But everywhere there is a clear view that there are too many Betting and Payday Loan shops : most people want their number reduced and hardly anyone is asking for more of them. In both of these town centres well over a third of people want the non-food offer to be enhanced

## Borough/Bankside



## Canada Water



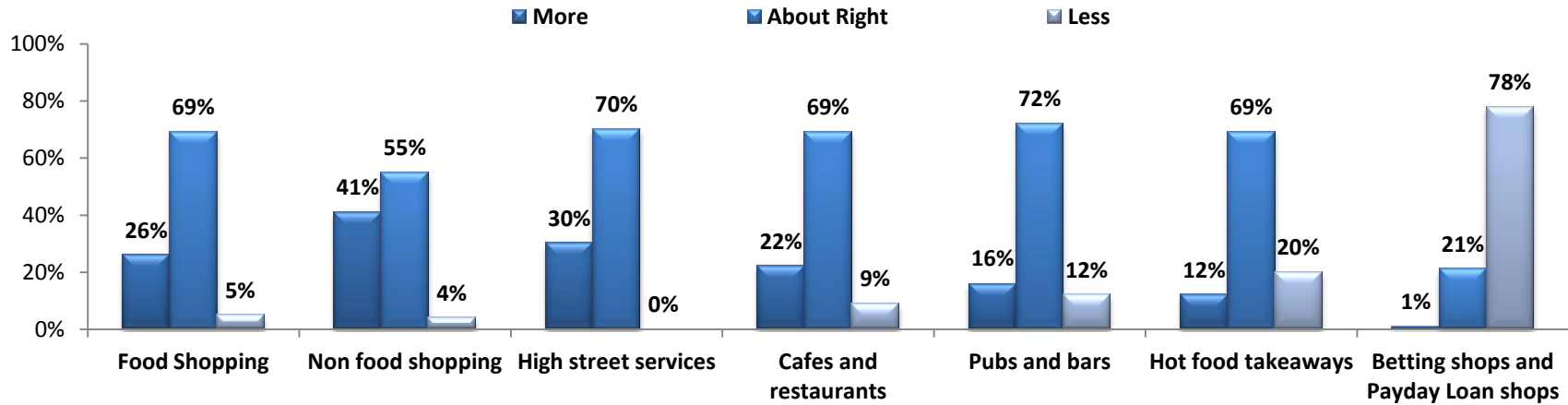
Q9. Of the following facilities, do you think there should be MORE/LESS or ABOUT THE SAME in this town centre?

Base 949

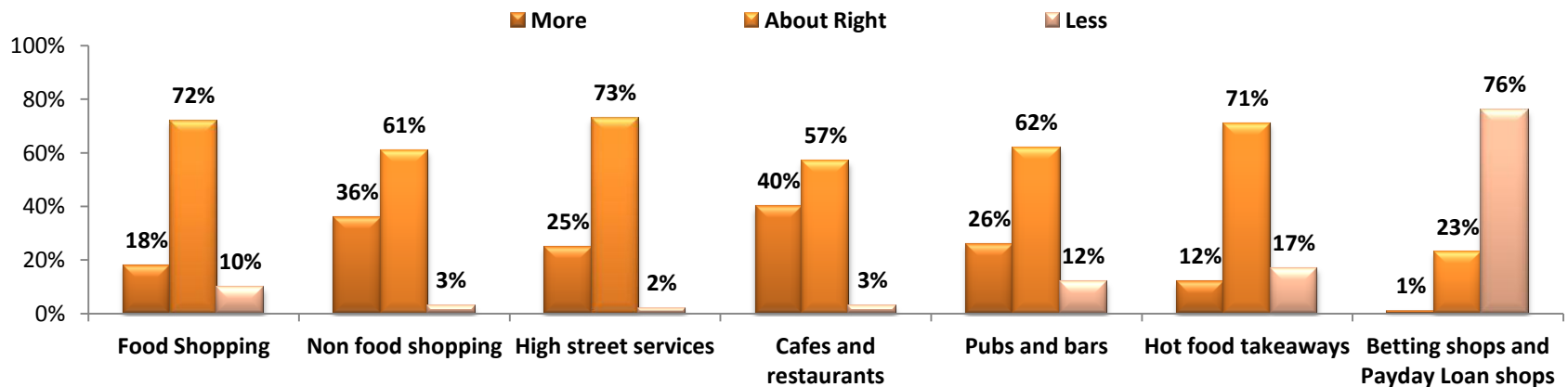
## Appetite for facilities (2)

The feature here, where there is a concentration of Betting and Payday Loan shops, is an overwhelming view that their number should be reduced. In Peckham 4 out of 10 people are asking for more cafes and restaurants, and more than a quarter lament the closure of pubs and bars. In Camberwell 1 in 5 believes there are too many hot food take-aways

### Camberwell



### Peckham



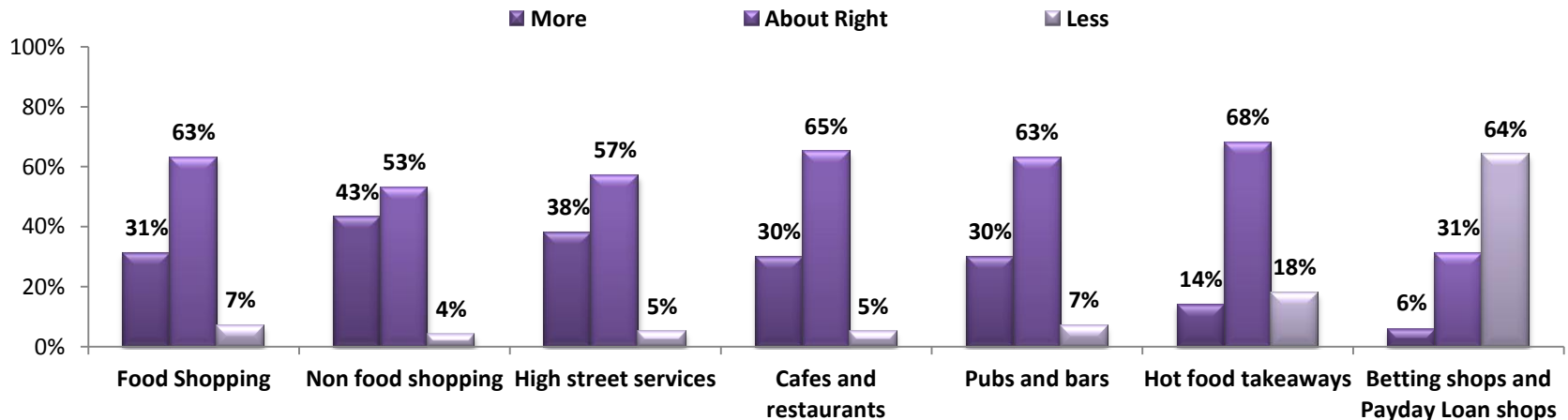
Q9. Of the following facilities, do you think there should be MORE/LESS or ABOUT THE SAME in this town centre?

Base 949

## Appetite for facilities (3)

In Walworth there is a stronger wish for more of some types of provision – especially ‘non food shopping’ and ‘High Street services’. And almost 1 in 5 believes there are too many ‘hot food take-aways’

### Walworth



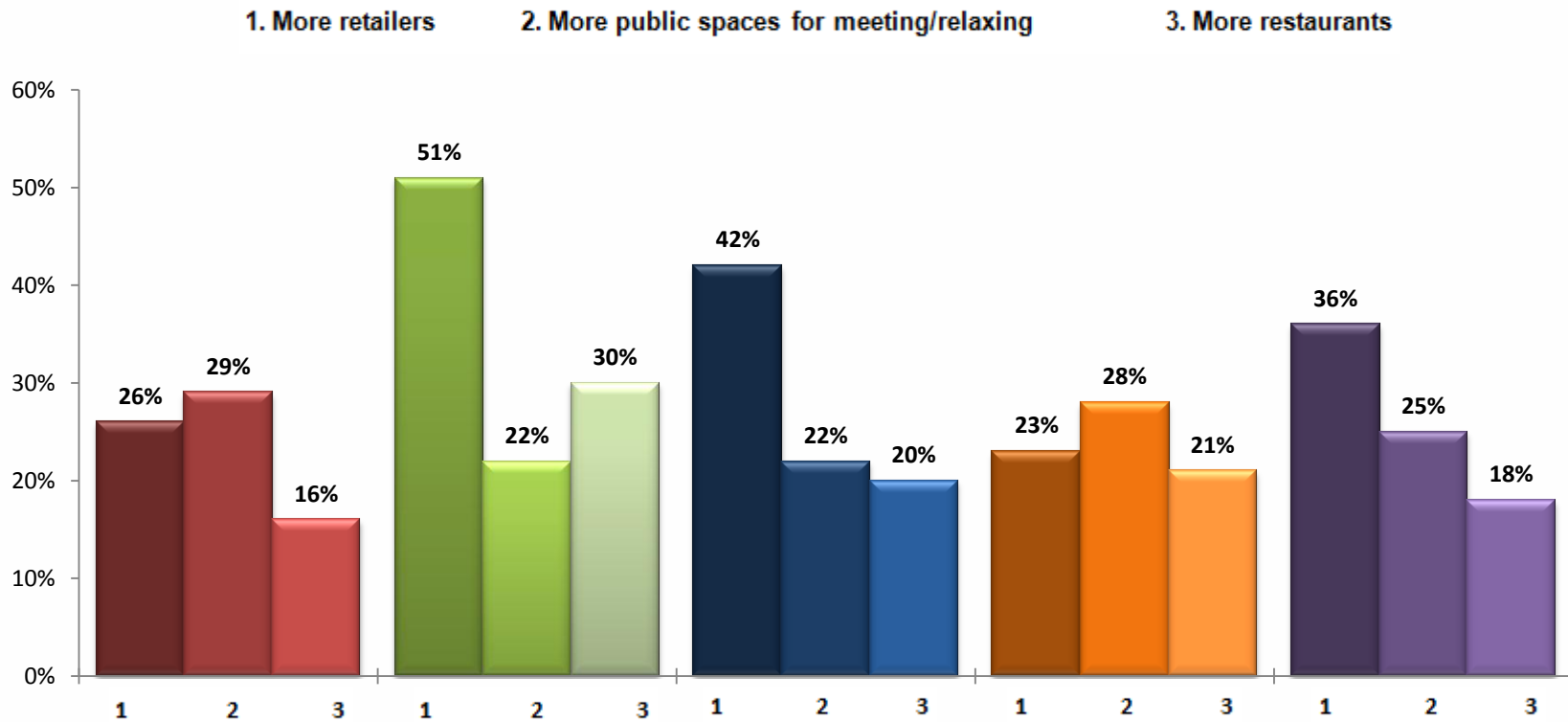
Q9. Of the following facilities, do you think there should be MORE/LESS or ABOUT THE SAME in this town centre?

Base 949



# Reasons to visit more often

From a long list of options only three reasons for visiting more often are strongly supported. At Canada Water there is clear dissatisfaction with the current shopping offer and a wish for an enhanced F&B offer



Q10. Which of the following things would persuade you to come more often to this town centre? (max 3 answers)

Base: 949

## Dislikes for Borough/Bankside area

These slides analyse responses to the question below 'what do you most dislike about this town centre'? The size of a word or phrase indicates the number of respondents referencing it. We have not reported people, approx one in 4, who said there was 'nothing to dislike' about their town centre



## Dislikes for Canada Water

Responses at Canada Water suggest a growing level of ennui with the environment and what is provided. More and Better are the asks, but there is also concern about safety in the area



## Dislikes for Camberwell

We find a web of dislikes around Camberwell linking street drinkers, Betting shops, beggars, and an unsavoury environment



## Dislikes for Peckham

Issues around Peckham are similar, though street drinking is not seen to be the hub as it is in Camberwell



Q11. What do you most dislike about this town centre? (open question)

Base: 949

## Dislikes for Walworth

Only in Walworth did we find significant anxiety about safety on the streets – possibly because only Walworth visitors tend to be also evening visitors. Here it outweighs even betting shops as a local cause for concern



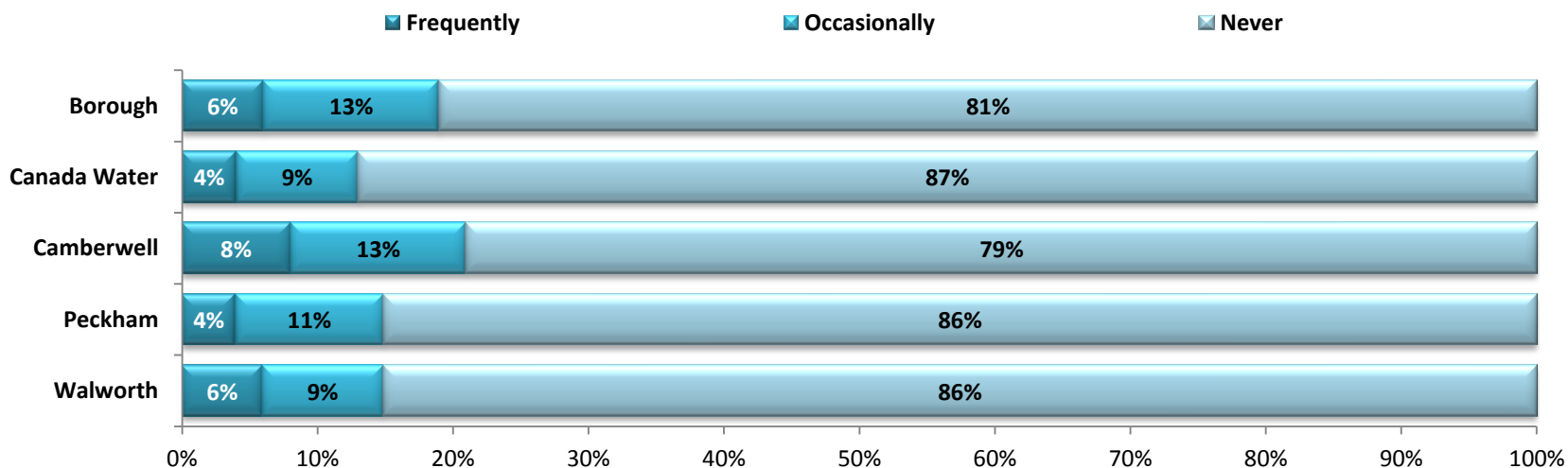
Q11. What do you most dislike about this town centre? (open question)

Base: 949

# Frequency of Visit – Betting Shops

The proportion of Southwark town centre visitors who say they have ever visited a Betting shop varies between 13% (Canada Water) to 21% (Camberwell). Everywhere the proportion who categorise themselves as frequent users is well below 10%. And very few people go to a Betting shop these days other than to place a bet

## Betting Shops



### Reasons to visit

Frequent Users: Slot Machines and Betting on Football and Horses

Occasional: Grand National, bet on horses, bet on football, roulette, to stay warm, to browse, to get a drink

Q12. How often do you visit Betting Shops?

Q13. When did you last visit one and what did you do there?

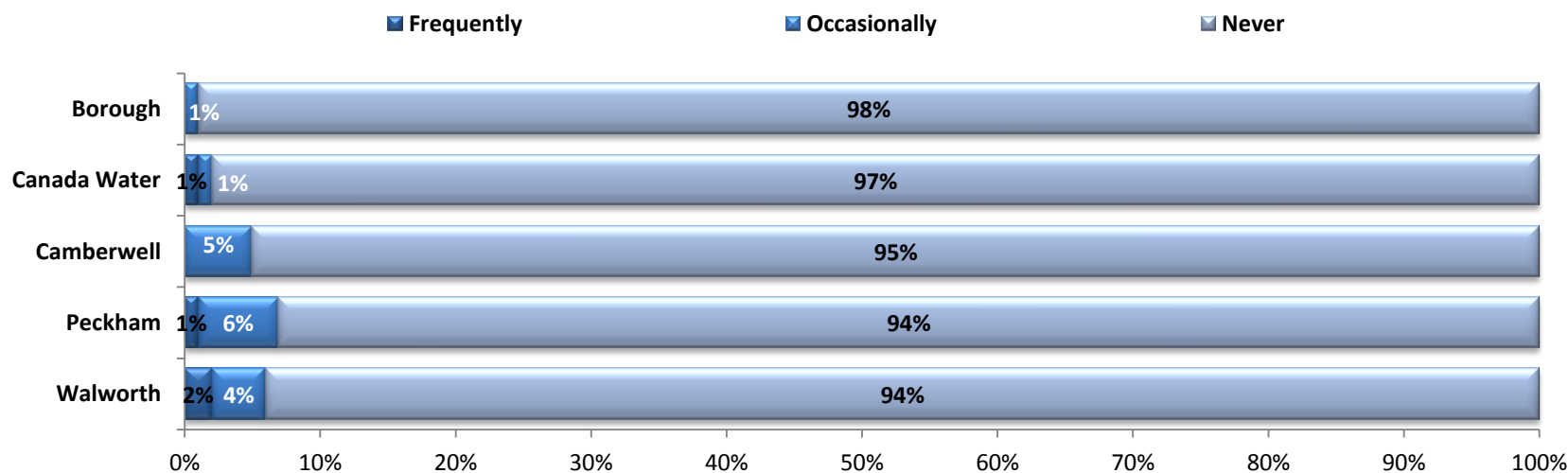
Base 949



# Frequency of Visit – Payday Loan shops

There may be some reticence at work here – but of our total sample only 5% say they have ever visited a Payday Loan shop; and of those hardly anyone professes to visit monthly or more often. There is no social element about these shops : the only reason for visiting is about borrowing money

## Payday Loan shops



### Reasons to visit

Monthly: To borrow money

Occasionally: Browse, take a loan

Different times: Enquire

Q12. How often do you visit Betting Shops?

Q13. When did you last visit one and what did you do there?

Base 949





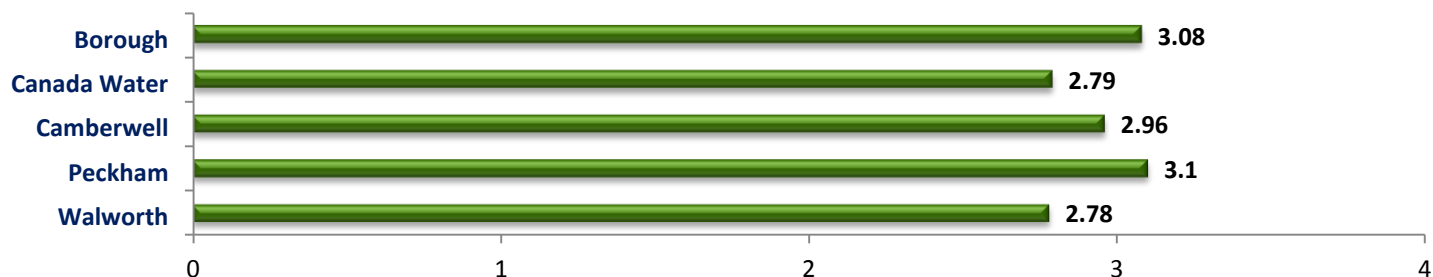
## Perception of Betting Shops

# Perception of Betting Shops

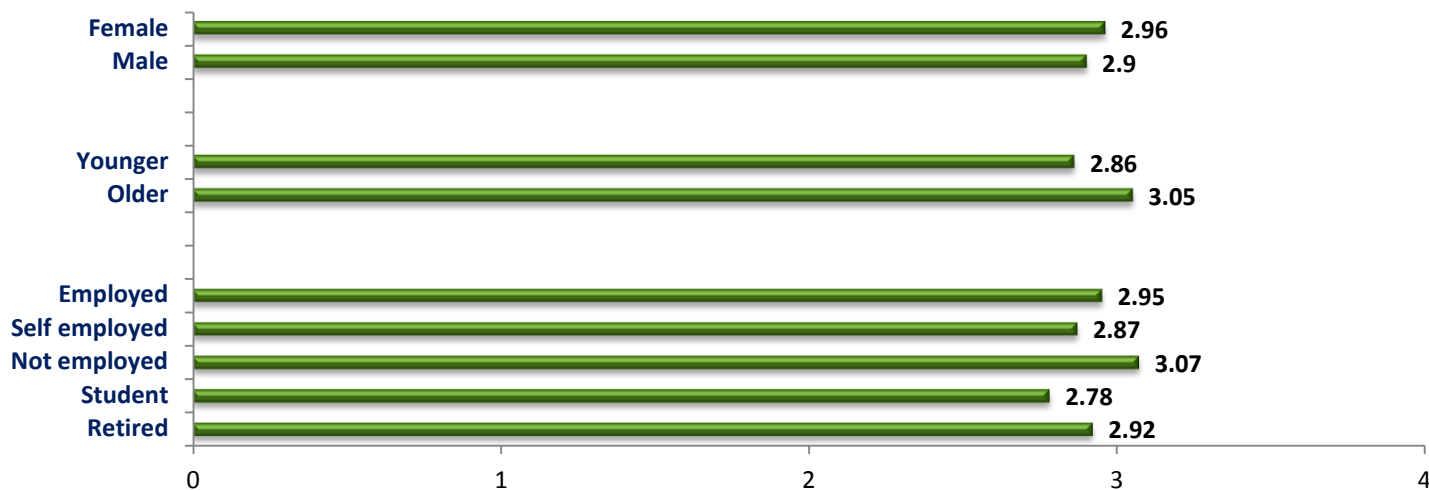
*People less likely to visit this town centre because of them*

This analysis is based on a scale of 1 to 5 – so any ‘score’ above 2.5 shows a balance in agreement with the statement. People not working, plus visitors to Borough/Bankside and Peckham are most strongly in agreement here

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

Base 949

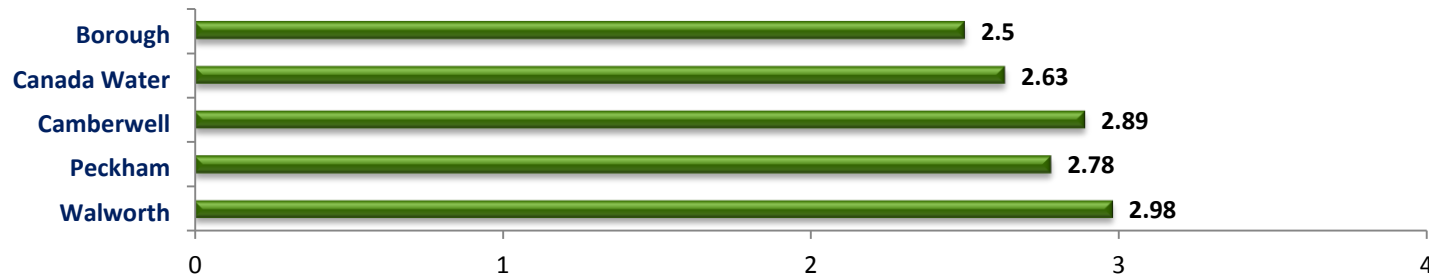


# Perception of Betting Shops

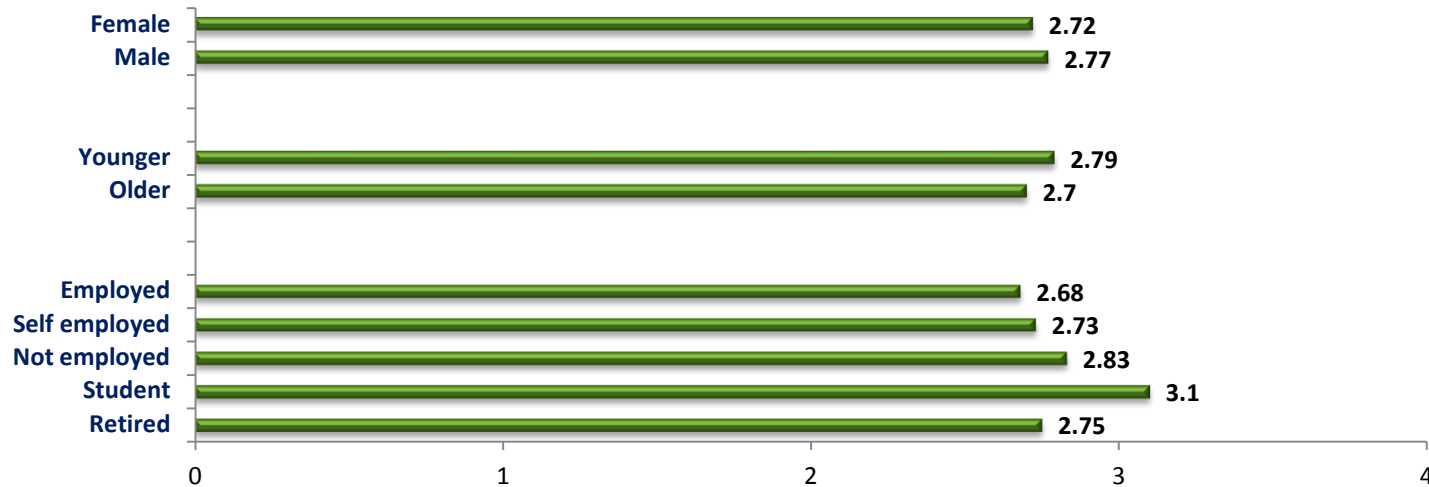
*They provide a meeting place for local people*

There is recognition that Betting Shops provide a place for people to meet and socialise. Students seem to favour them for this purpose

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

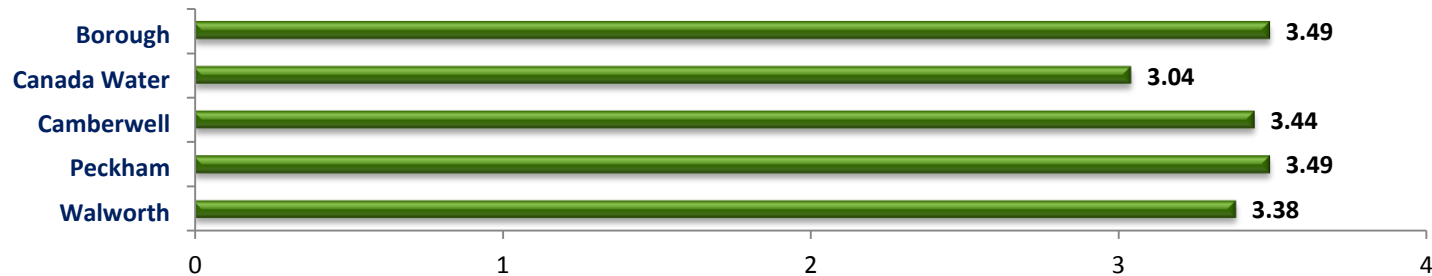
Base 949

# Perception of Betting Shops

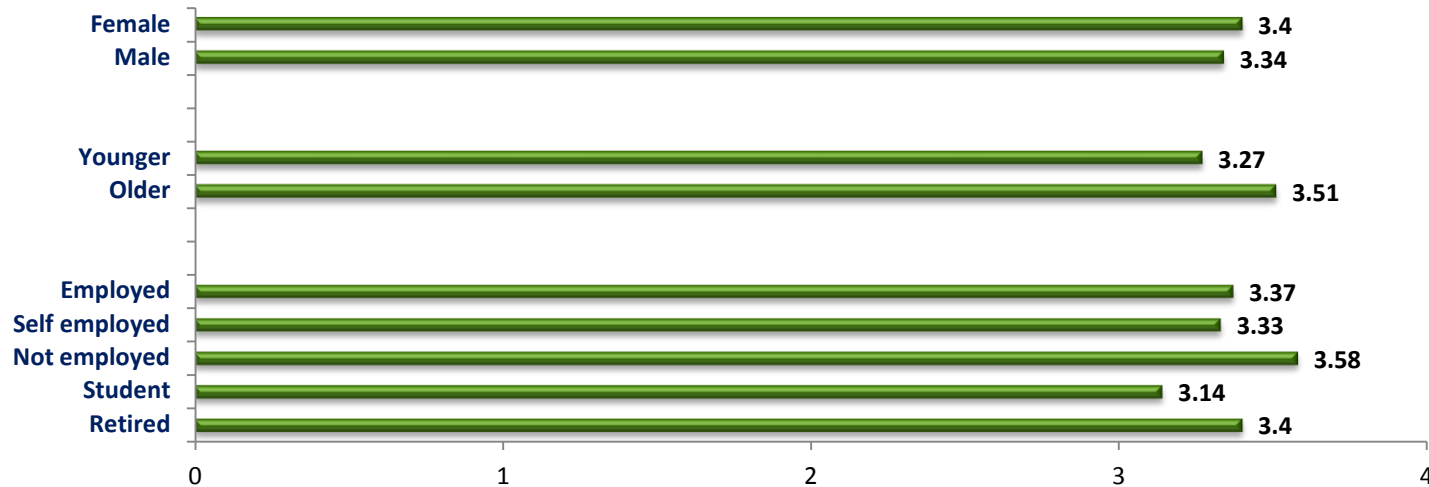
*They reduce the diversity of shops in this town centre*

We see strong levels of agreement with this proposition. Older visitors and those not working show the strongest levels of agreement

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

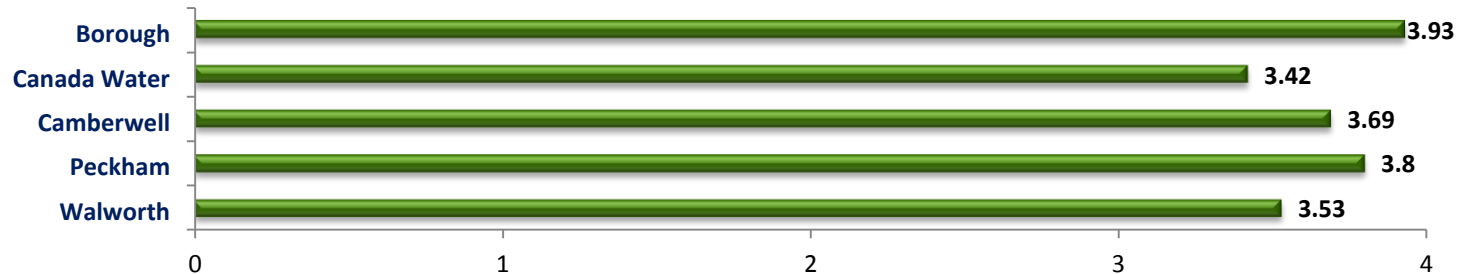
Base 949

# Perception of Betting Shops

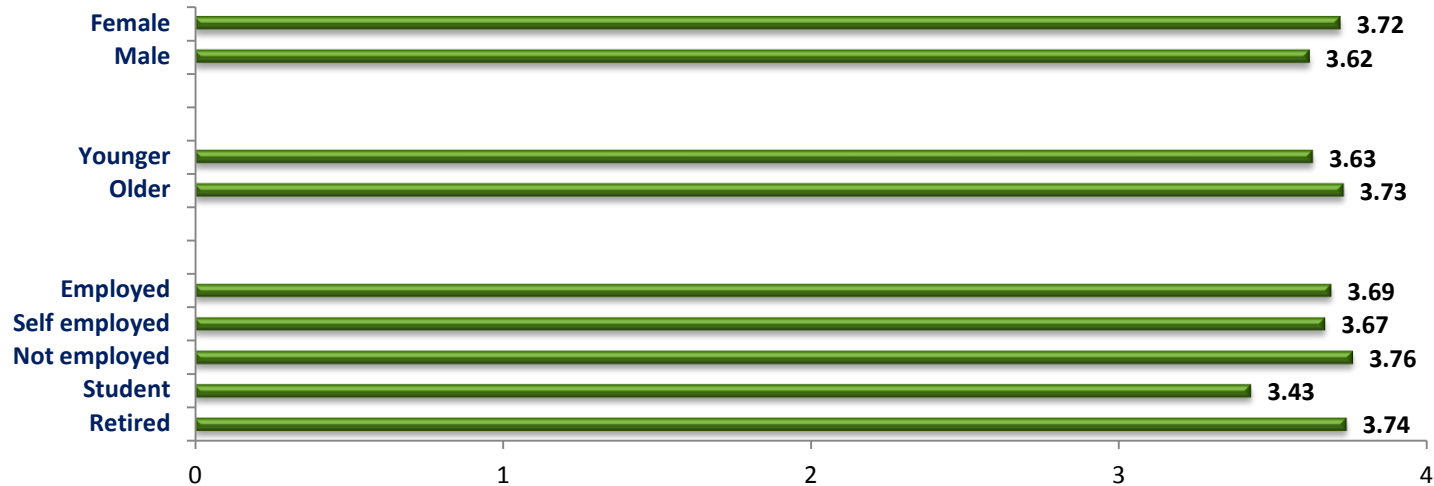
*They make the town centre less attractive*

Again, strong levels of agreement with this proposition. In Borough/Bankside there is a strongly-held view that Betting Shops can jeopardise the character of this historic neighbourhood

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

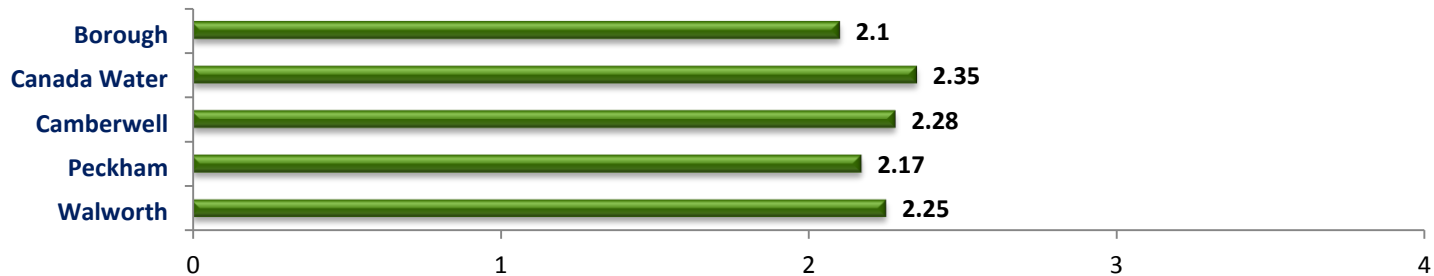
Base 949

# Perception of Betting Shops

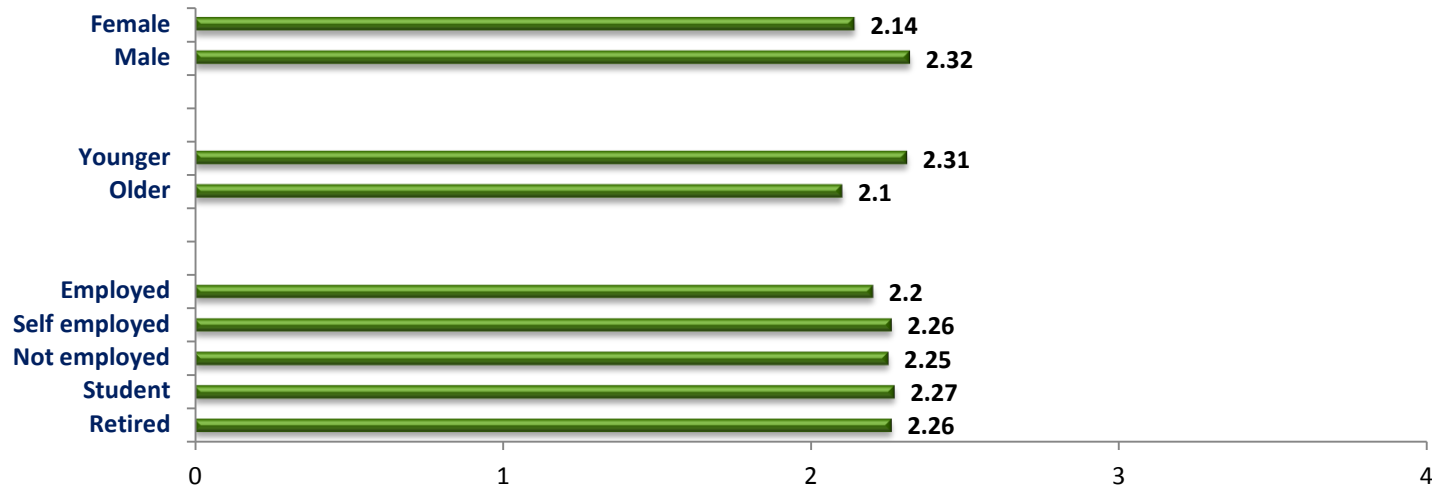
*They provide a valuable service for local people*

We see low levels of approbation with this proposition across the board, with agreement just creeping above a 'score' of 2

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

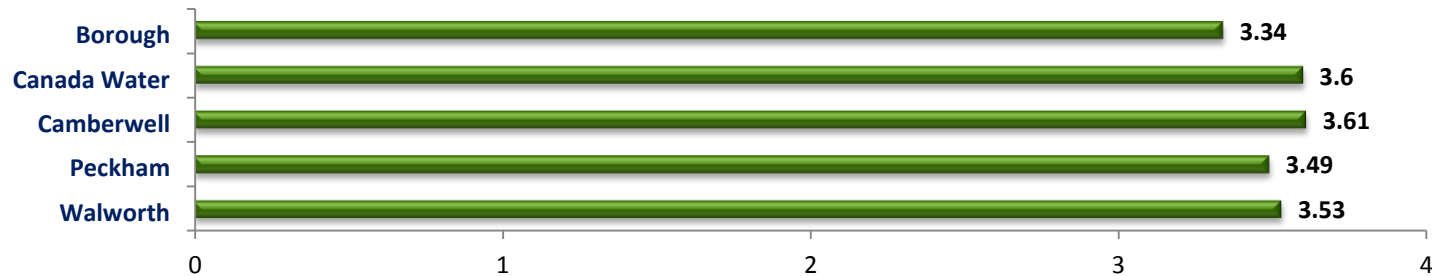
Base 949

# Perception of Betting Shops

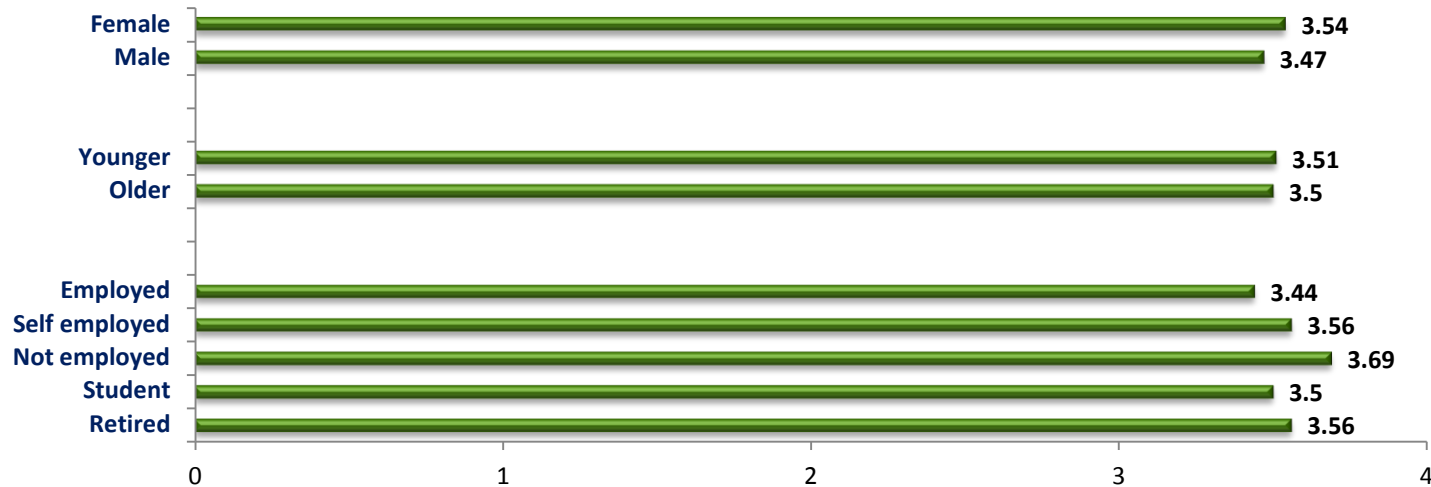
## *They attract anti-social behaviour*

Certainly the balance is in agreement with this proposition. People not working are most firmly in agreement, possibly reflecting personal experience

### By Location:



### By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

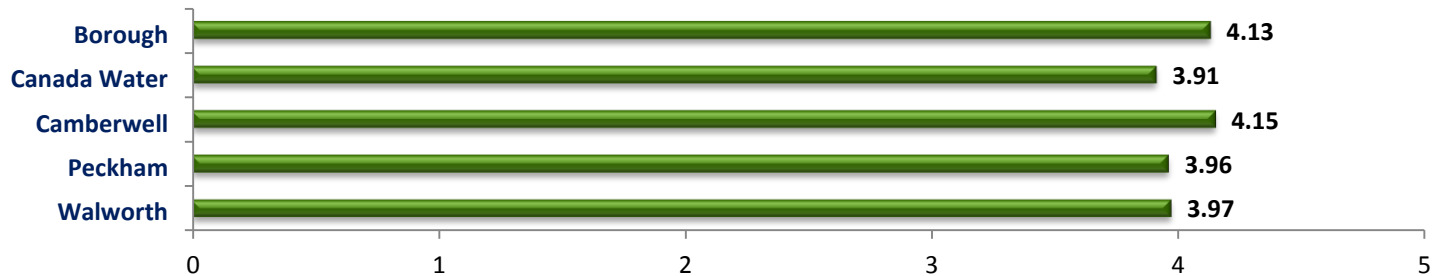
Base 949

# Perception of Betting Shops

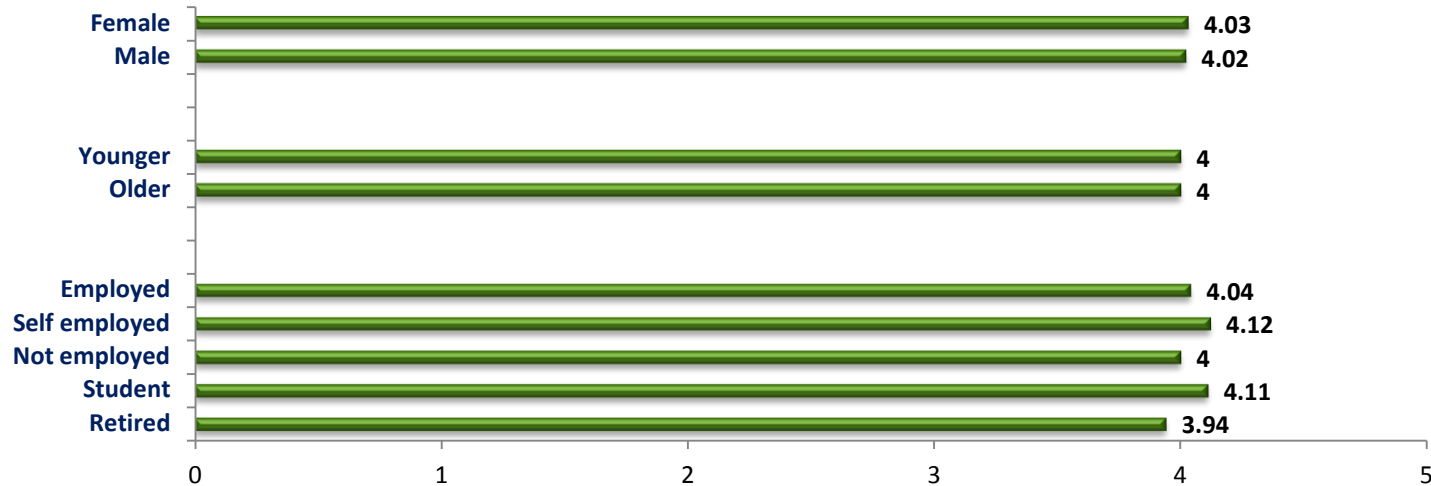
*They can affect people's health, quality of life or well being*

There is a strong level of agreement with this statement. Most groups 'score' over 4, a rarity indicating very firm support

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

Base 949

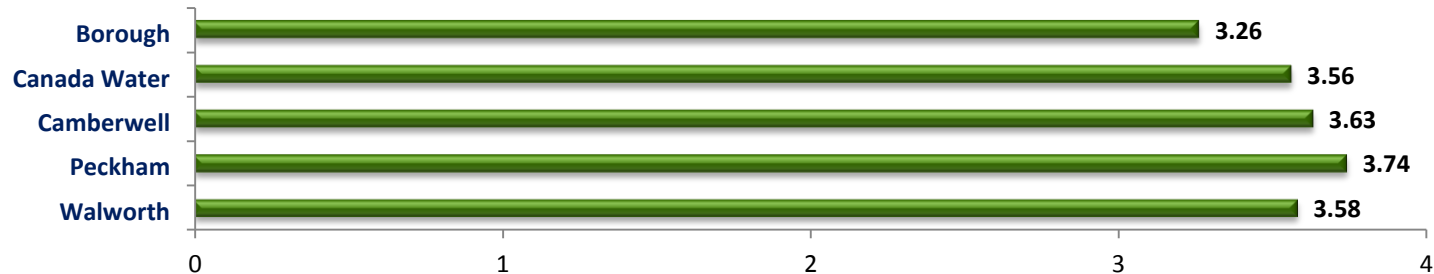


# Perception of Betting Shops

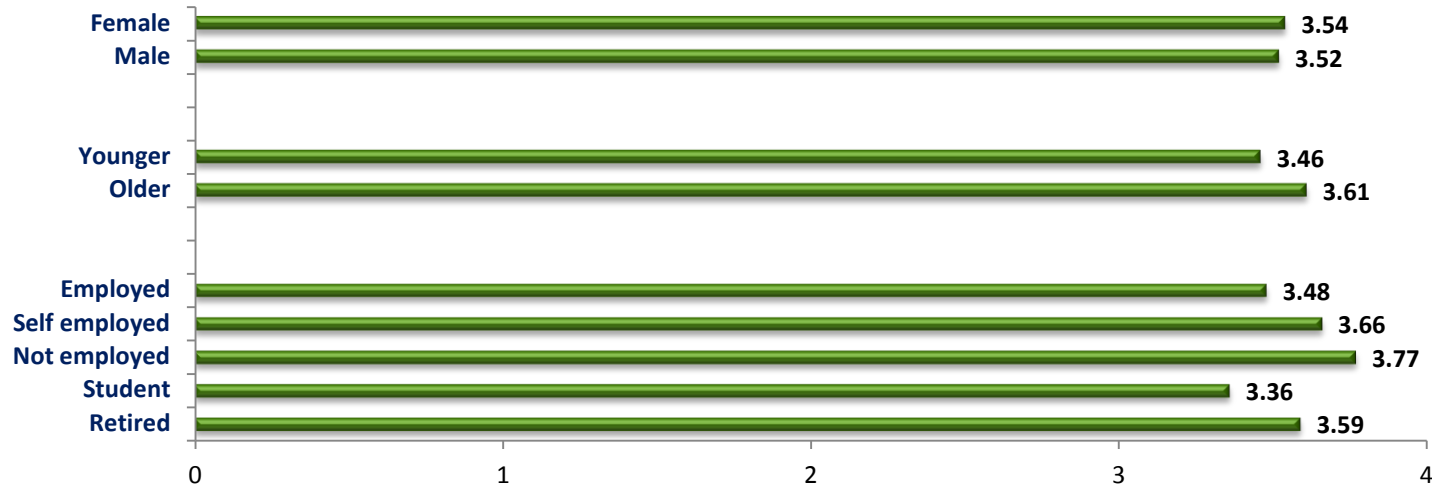
## *They attract the wrong type of people*

There are strong levels of agreement that Betting shops tend to attract 'the wrong type of people', with all town centres approving the statement. Lowest levels of support are among students and people in the Borough/Bankside area - where there are fewer Betting shops

### By Location:



### By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

Base 949

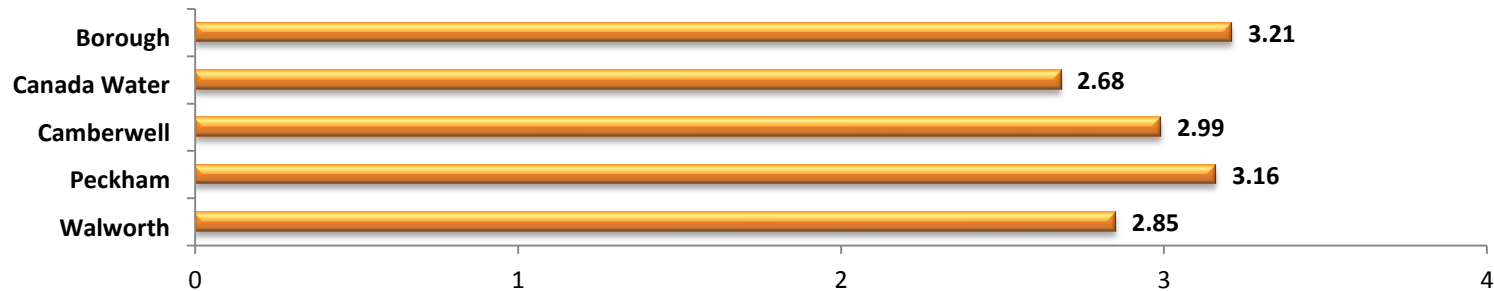
## Perception of Payday Loan Shops

# Perception of Payday Loan Shops

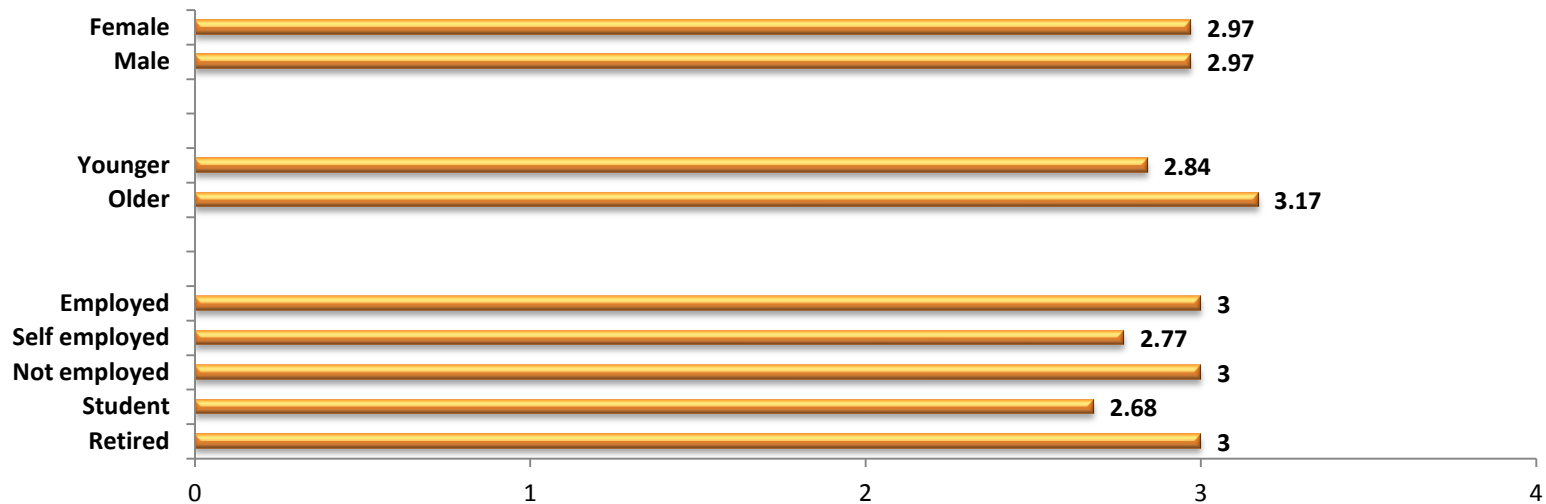
*People less likely to visit this town centre because of them*

Opinion polarises more around the issue of Payday Loan shops, with older visitors strongly identifying with this proposition. Students on the other seem less troubled by their impact

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

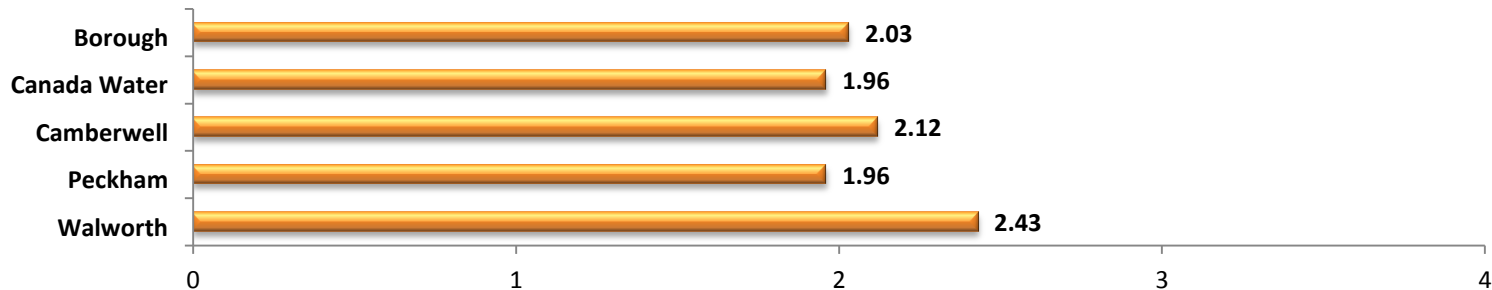
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# Perception of Payday Loan Shops

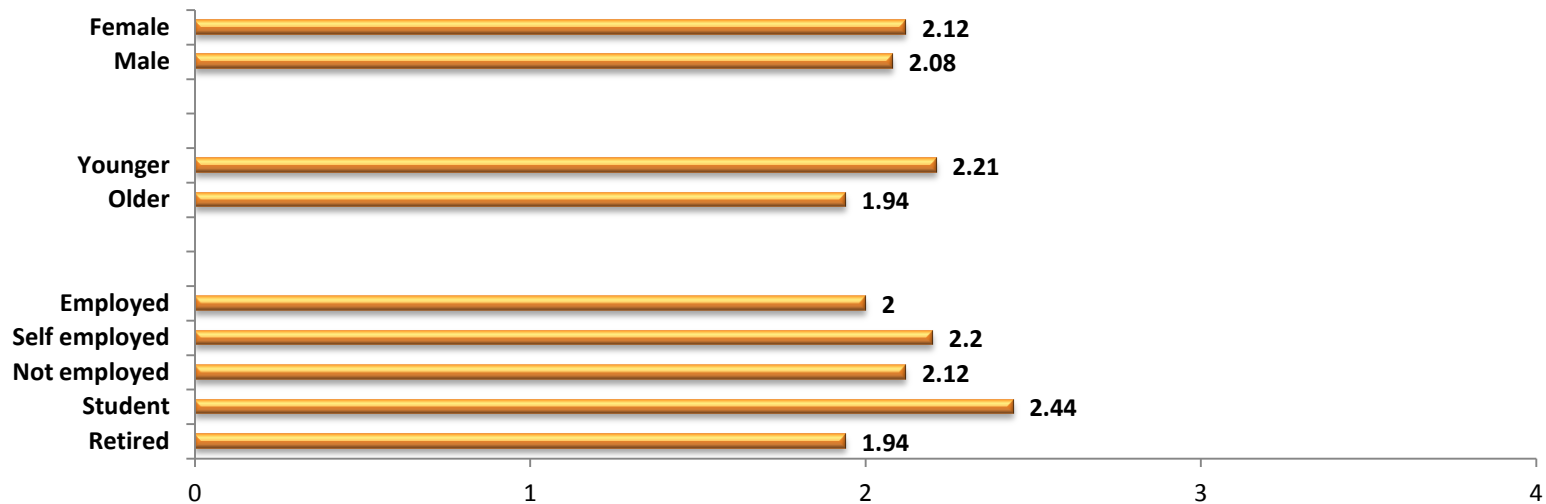
*They provide a meeting place for local people*

This proposition has by a long way the lowest level of support, with some sub-sets (unusually) dipping below a score of 2. Older visitors and retired people have little time for this proposition

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

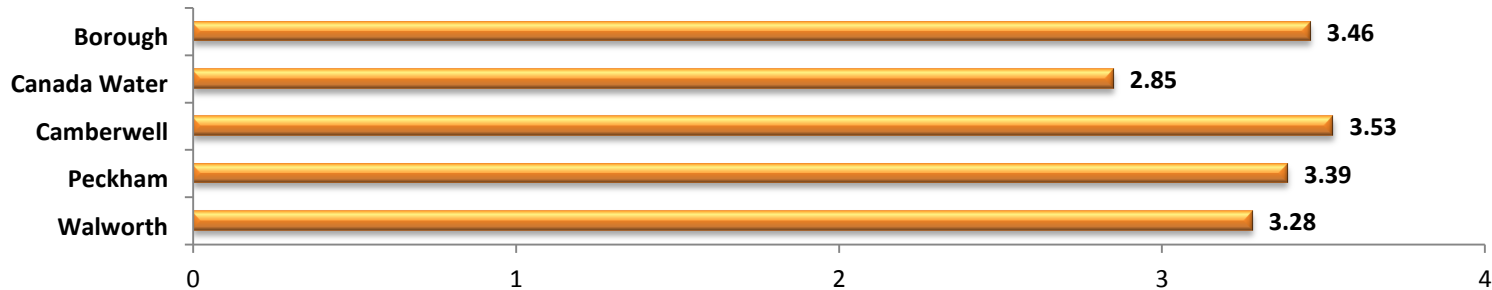
Base 949

# Perception of Payday Loan Shops

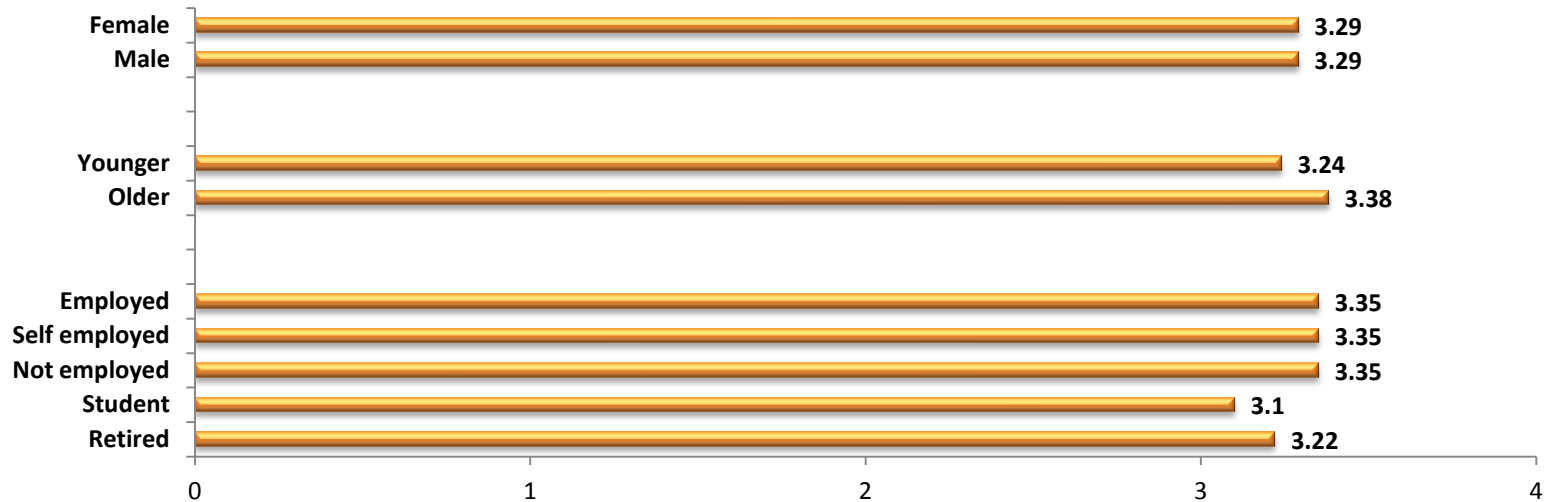
*They reduce the diversity of shops in this town centre*

There is a broadly uniform accord that Payday Loan shops are reducing diversity for town centre shoppers

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

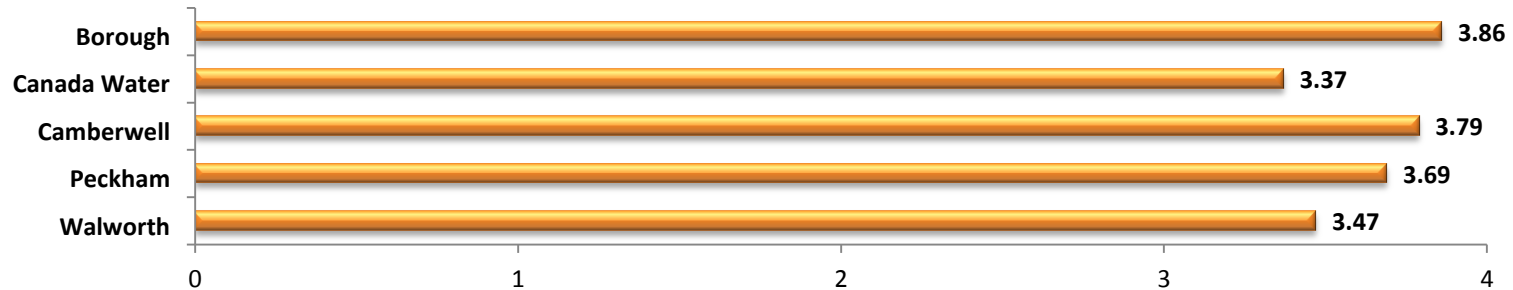
Base 949

# Perception of Payday Loan Shops

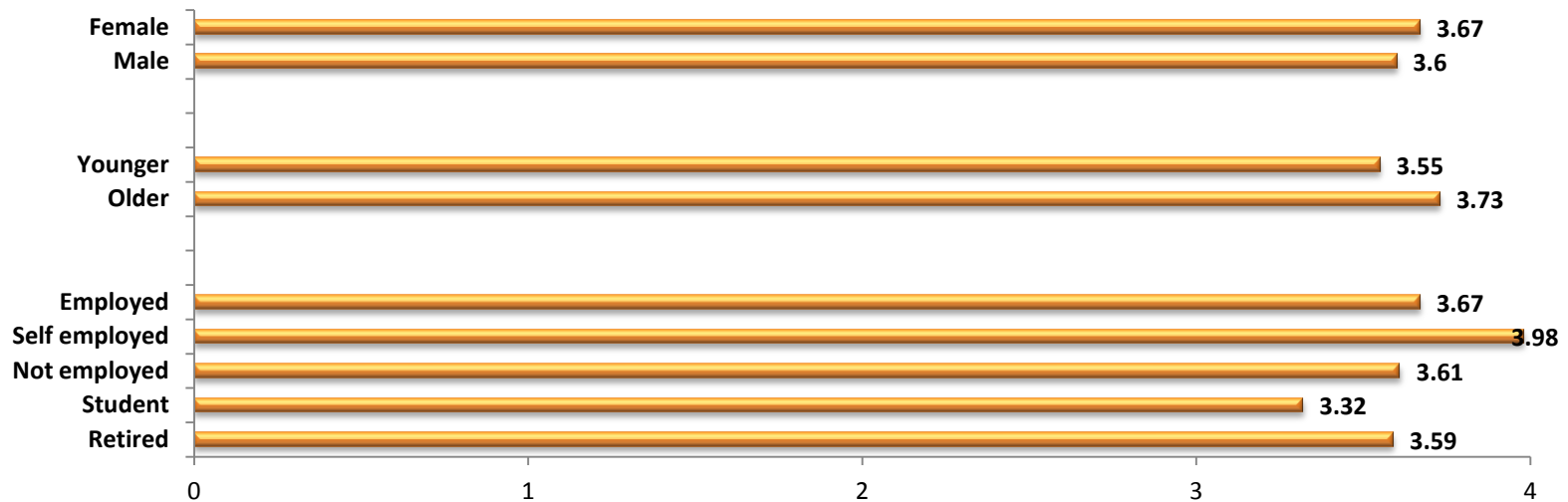
*They make the town centre less attractive*

The consensus is clearly in agreement with this statement, with particular antipathy in the Bankside/Borough area and among self-employed people.

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

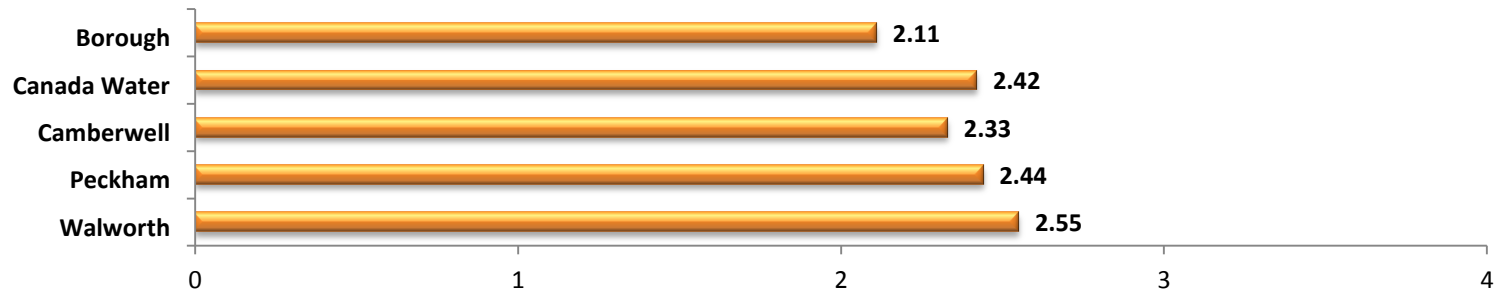
Base 949

# Perception of Payday Loan Shops

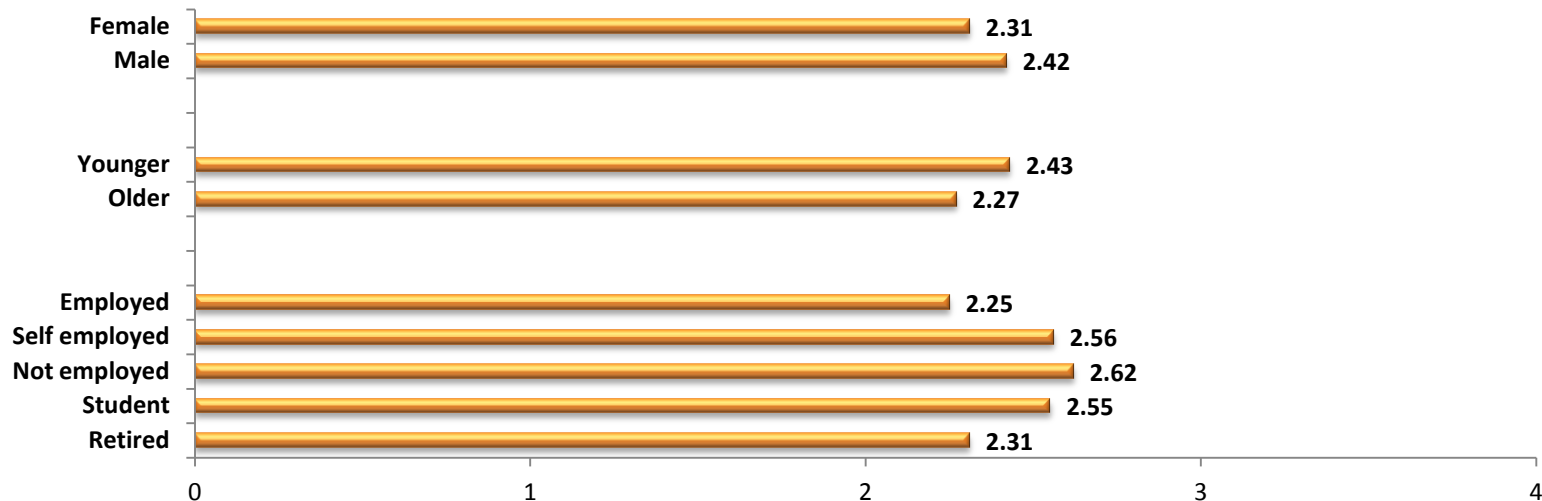
*They provide a valuable service for local people*

Views on this proposition range between a moderate level of support and a moderate level of rejection. Broadly speaking people without an assured income (self-employed, not working, and students) recognise that Loan shops sometimes offer a lifeline to desperate people unable to borrow elsewhere

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

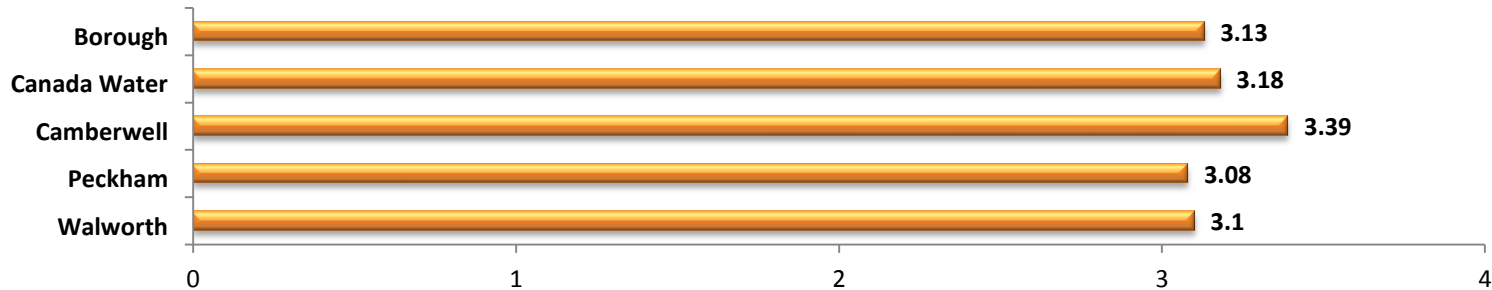
Base 949

# Perception of Payday Loan Shops

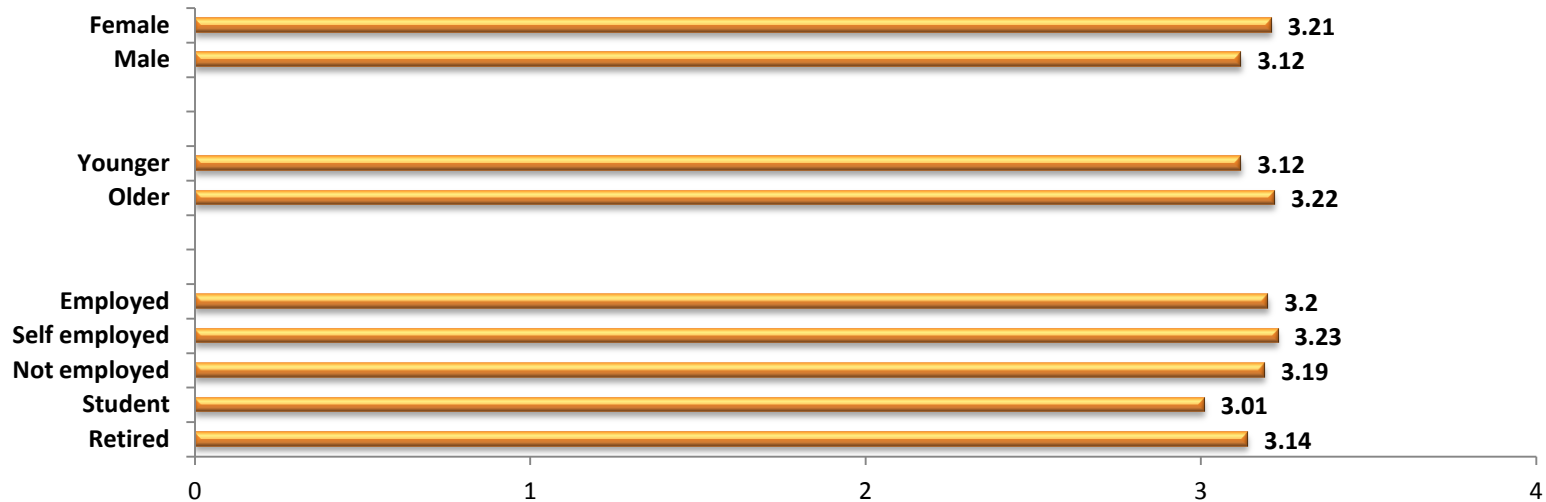
## *They attract anti-social behaviour*

Broadly visitors to Southwark town centres agree with the observation that Payday Loan shops attract anti-social behaviour

### By Location:



### By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

Base 949

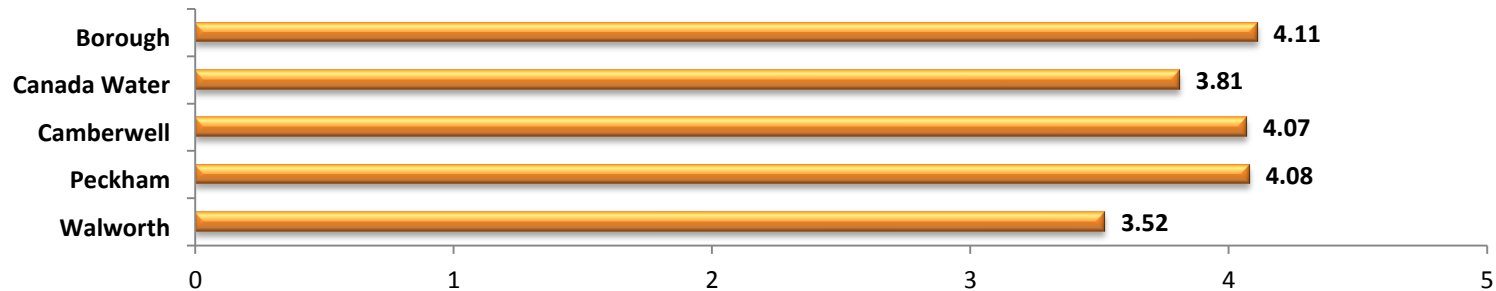


# Perception of Payday Loan Shops

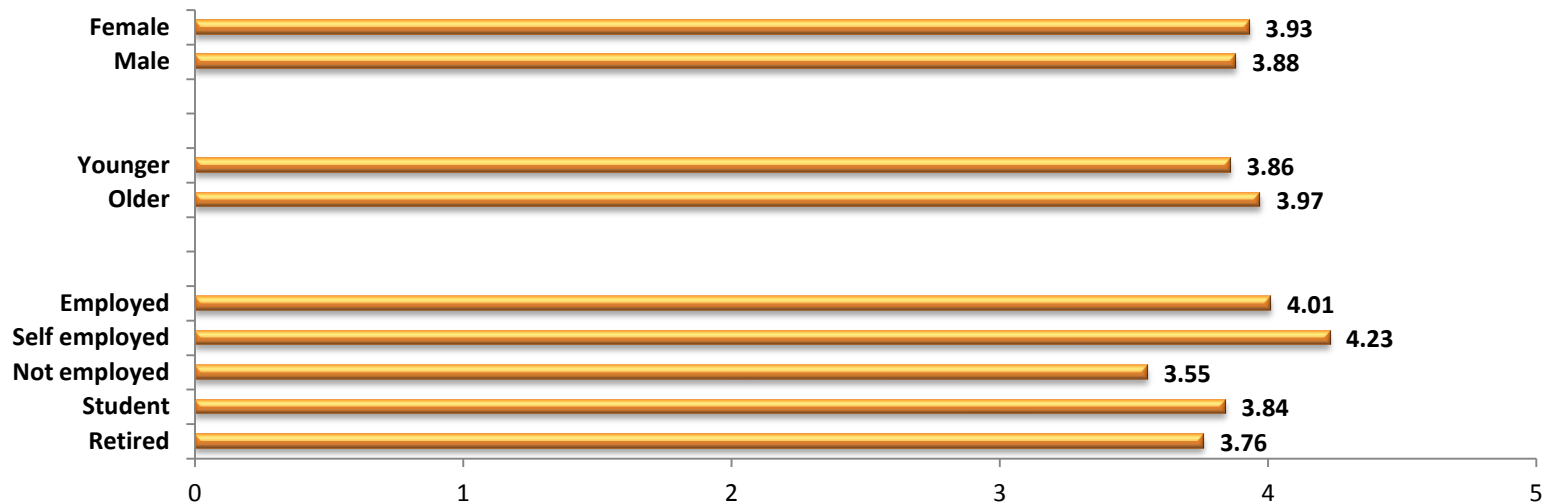
*They can affect people's health, quality of life or well being*

With these style of questions a score over 4 is a rarity and denotes strong feelings on an issue. Everyone and everywhere confirms their agreement, with self-employed people especially scathing

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

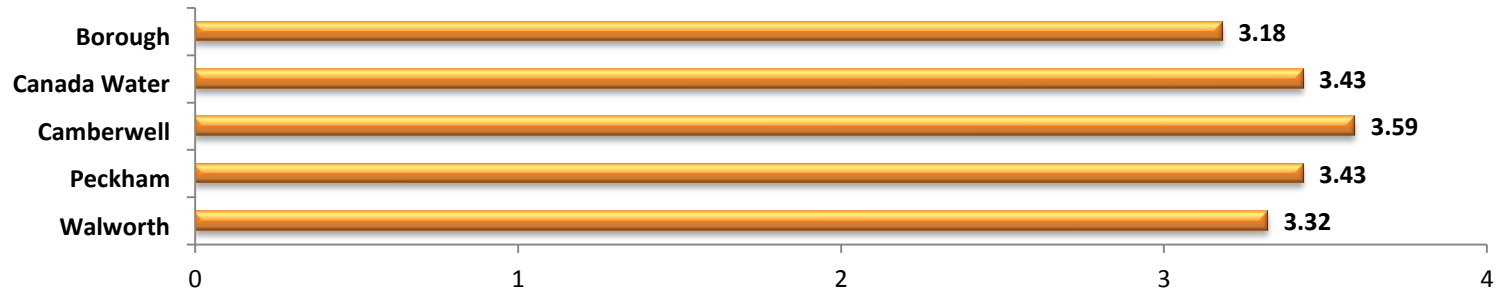
Base 949

# Perception of Payday Loan Shops

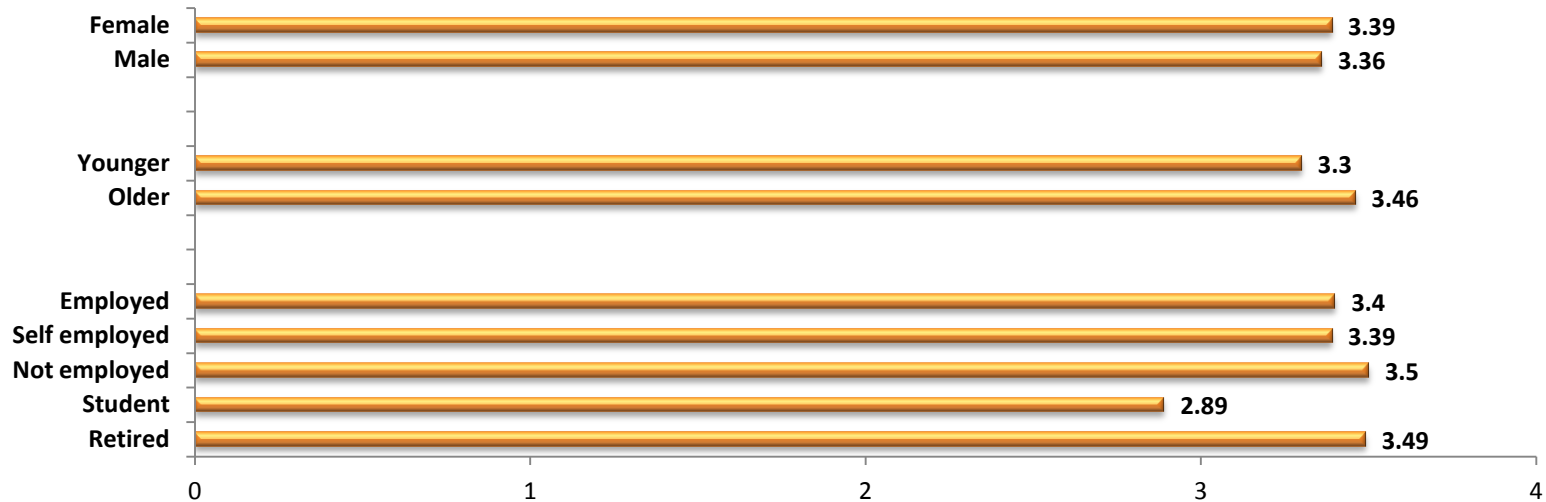
*They attract the wrong type of people*

Whilst there is agreement everywhere with this proposition, 'students' provide something of an outlier. Interviewers reported young people felt uncomfortable with the assumptions behind this statement

## By Location:



## By Demographics:



Q16. How far do you agree with the following statements about the presence of Betting Shops in this town centre?

Rating question: 1 disagree strongly – 5 agree strongly

Base 949

## Understanding Perceptions of Southwark Town Centres

February 2014



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