Southwark high streets: **Walworth Road**

www.southwark.gov.uk

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September 2015

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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 Walworth Road.

1.1 Summary of Findings

The Retail Mix: The shopping on Walworth road is broadly diverse in scale and scope: most retail categories are available and some national brand names are present. The selection is somewhat skewed away from foodservice, perhaps because of the presence of a McDonald's which is a well known category killer. Shopping is largely for comparison more than convenience goods which defines the competition for footfall with other retail centres.

The People on Walworth Road: The people we interviewed were predominantly young, single, some still living at home, and with a large proportion not in employment. They are not as affluent as in other parts of the borough, and for the most part they live locally in rented accommodation, or work locally, or both. They typically arrive on the high street by foot on the bus, or by car, and spend a relatively long time and relatively high amounts of money.

Footfall Densities: The footfalls observed are in the mid-range in this study and on average they reach 850 people per hour. Saturday and Tuesday are somewhat similar in the amount of passing trade but peak on Tuesday and Saturday occurs after lunch time.

Consumer Behaviour: The visitors come rather infrequently – every other week, or less. They spend a longer amount of time but an above average sum of money on each occasion, Most will spend something, whatever other reason they have for being there, and they shop a disproportionate amount in comparison goods stores, which is atypical.

Attitude & Usage: The main motivation for being on the high street is not convenience, although few visit to patronise a specific business. The main positive attribute is the choice of shops. On the other hand another sizable part of the sample complained that the choice of retail outlets ***and*** the choice of foodservice options are limited. This creates a useful context to market any specific existing business since expectations are low. But it is a dangerous situation given the infrequent nature of the populations' visits to Walworth Road. Furthermore, there is little community feeling for the area – when asked to recall community events attended, most named occasions beyond or outside the area.

Marketing interventions to date appear to have had some effect. There is low awareness of local advertising and local events, but the main channels through which the population can be reached here are new digital and therefore cheap to organise. The people are open to word of mouth and there is some awareness and usage of online bulletin boards.

The uptake of marketing promotions, especially digital marketing tools, is also extremely high with this population, suggesting it as an effective tool to drive footfall to the area, East Street Market is well known and might be a catalyst for initiatives to encourage more frequent visits.

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 gradually decrease as a result of an evolving sub-optimal retail mix.

Table 1: Retail mix comparison; Walworth Road

	Walworth Road	Average
		%
Number of Stores:	**127**	**80**
	%	**%**
Foodservice *Restaurants, Cafes, Coffee Shops*	11	25
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	10	11
Mixed Non-Food Retail *Clothing, Shoes Accessories, DIY, Toys*	24	25
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	23	13
Technology *Phone Shops, PC repairs, Electricals*	11	4
Entertainment *Betting Shops, Libraries*	3	4
Grocery *Multiple & specialist independent retail*	18	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 1 which compares the number and types of stores identified on Walworth Road with the distribution seen across all the high streets in the study. In total 127 different businesses were counted on both sides of the street in this retail centre. This is well above the average of the eight centres studied. Of the 26 categories in the analysis 19 were represented on Walworth Road, giving a diversity index of 0.73.

The retail mix contains average provision of grocery and specialist grocery stores including convenience and national brands. It also has a representative proportion of comparison goods stores, but it is skewed away from restaurants, takeaways and coffee shops, (there is a McDonald's) while featuring rather more tanning and beauty salons and technology outlets than expected.

Walworth Road is well served by many bus routes passing through, and has a busy market on East Street. Research was conducted on one section of the long retail centre running from The Elephant & Castle down to Camberwell Green: missing offers may be better represented across this total area.

3. Respondent Demographics

The students interviewed 42 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 = 42	Average %	Walworth Road %
18 – 24	18	29
25 – 34	30	40
35 - 44	23	21
45 – 54	15	7
55 – 64	7	0
65 – 74	5	0
75 or older	2	2
Male	47	40
Female	53	60

A young shopper profile

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.

Tabl compares the population banding across the entire survey with the respondents on Walworth Road. Both results show a bias towards the younger groups, but it is very much more pronounced in the sample; we found 70% of respondents to be under 34.

Table 3: Ethnicity Overview

	Average %	Southwark %	Walworth Road %
White	61	54	36
Black	19	26	31
Asian	8	10	19
Mixed	9	6	12
Other	1	3	2

In terms of ethnicity, Table 3 compares the respondents on the Walworth Road with the survey averages and with Southwark population data. The visitors were somewhat more likely than average to be of black or mixed ethnicity, and rather more likely to be of black, asian or mixed ethnicity. The bias was pronounced. In terms of education, the sample was better educated than the average for the borough, with a skew towards a university degree.

Table 4: Education

	Average %	Walworth Road %
Compulsory Education at School	14	10
Vocational or College or 6th Form	31	26
University	55	64

The sample interviewed was slightly more likely to be in employment than expected (Table 5), but less likely to be in managerial or professional occupations. Many were in sales and customer service positions or in Caring or Leisure roles.

Table 5: Occupation

	Average %	Walworth Road %
Sales and customer service occupations	17	26
Not currently working	23	21
Caring, leisure and other service occupations	10	17
Managers, directors and senior officials	10	7
Administrative and secretarial occupations	8	7
Skilled trades occupations	6	7
Professional occupations	20	5
Associate professional and technical occupations	4	5
Process, plant and machine operatives	2	5
Elementary occupations	2	0

Walworth Road shoppers are more likely than average to be living in single person households, or to be cohabiting, and highly likely to be living in households with children to the extent that the prevalence of children is probably three times the borough average (Table 6).

Table 6: Household Structure

	Average %	**Walworth Road %**
Single	41	**45**
Married	35	**24**
Civil Partnership	2	**0**
Living with partner	12	**21**
Divorced	4	**0**
Widowed	2	**2**
Separated	2	**0**
Number of Adults in the home:		
1	28	**24**
2	51	**57**
3	13	**12**
4 +	7	**7**
Number of 13-17s in the home:		
0	81	**52**
1	12	**40**
2 +	7	**7**
Children under 13:		
0	78	**45**
1	13	**36**
2	7	**19**
3 +	2	**0**

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. The number replying that they live rent free, taken in conjunction with the younger profile of the sample may indicate that respondents were still living at home. For a small sample the non-response level for this question was however high at 16%.

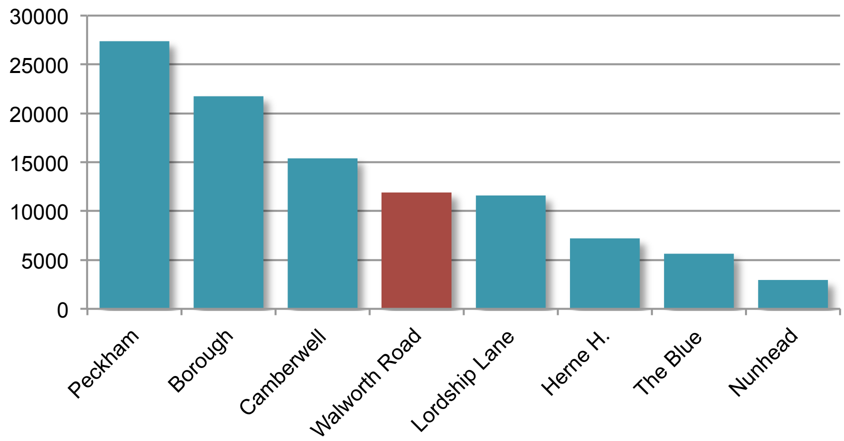
Table 7: Household Occupancy

	Average %	**Walworth Road** %
Rent	52	45
Own it outright or with a mortgage	31	22
Shared ownership or Housing Association	6	2
Live there rent free	5	14
Other/ No response	7	16

4. Footfall Distributions

Walworth Road is among the mid-tier high streets observed. Over the course of two days over 11,000 pedestrians were counted passing on either side of the street. This amounts to an average footfall density of 850 people per hour, comparable with pedestrian densities at Lordship Lane. Figure 1 compares the footfall with the eight high streets in the study. Peckham Rye, Camberwell and Borough all have higher densities, but are different in character.

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



4.1 Weekend & Weekday Ratio

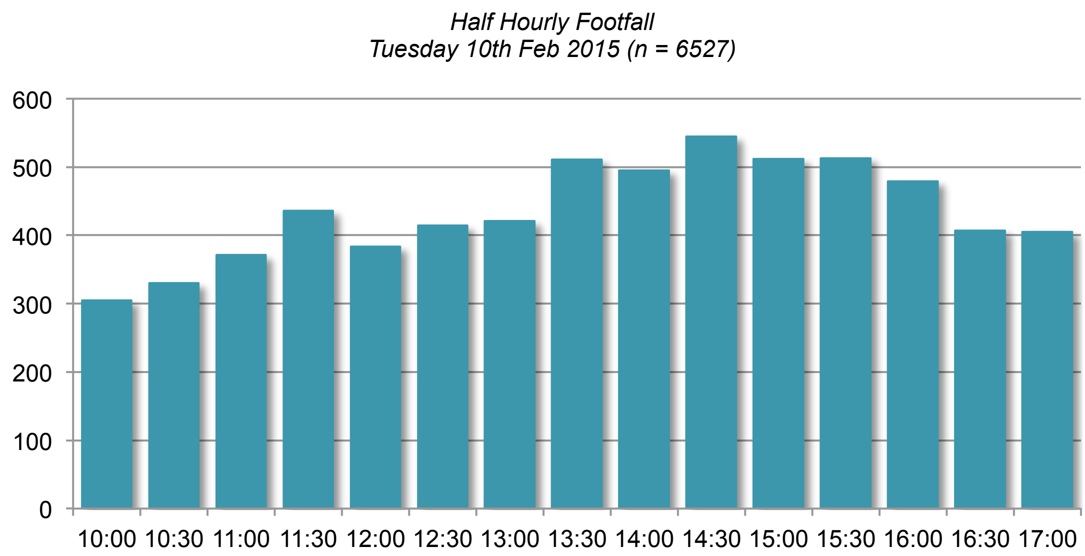
Table 10 highlights the density ratio between Saturday and Tuesday. On Walworth Road, unlike some other centres in Southwark, it appears that the ratio remains relatively constant between the two days, with just a 16% uplift observed for Saturday.

Table 8: Comparative footfall by day: February 2015

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

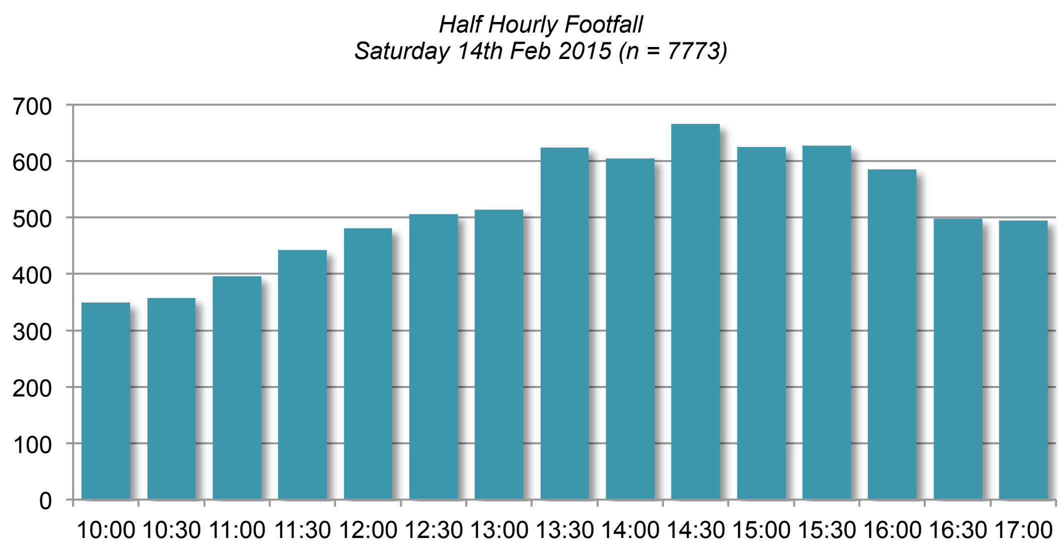
	Tuesday	Saturday	Total	Average Hour
Peckham (Rye Lane)	10778	16599	27377	1900
Borough High Street	11569	10204	21773	1600
Camberwell	**7759**	**7637**	**15396**	**1100**
Walworth Road	5527	6369	11896	850
Lordship Lane	2954	8645	11599	830
Herne Hill	2851	4330	7181	500
The Blue	2677	2945	5622	400
Nunhead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

4.2 Footfall Count: Tuesday



Tuesday footfall on Walworth Road peaked just after lunch, at 13.30, before returning to the earlier level at around 16.30 for the remainder of the observation period.

4.3 Footfall Count: Saturday



A later peak was observed on Saturday, and at a higher level although the afternoon dropped away at around the same time. These patterns indicate a strong afternoon trade across the week, and suggest that the retail mix may be closely meeting at least some aspects of local demand.

The pattern suggests a *"make hay while the sun shines"* strategy, indicating that retailers should be well prepared to meet the needs of the available traffic in a concentrated period across the second part of the day.

5. High Street Catchment Area, Travel Time & Method

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

Over half of the respondents (55%) in Walworth Road lived in the local postcode, SE5 or the adjacent SE1. The remainder lived in fifteen further postcodes, spread largely but not exclusively from around South East and East London (Table9).

Table 9: Catchment Area

Walworth Road	
	%
SE17	48
SE1	7
E16	5
SE11	5
SE16	5
SE8	5
E1	2
E14	2
E15	2
IG1	2
SE15	2
SE5	2
SE6	2
SW10	2
SW19	2
SW9	2
W10	2

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.

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 90% of the visitors interviewed considered themselves to be local to Walworth Road by virtue of where they lived or worked. The proportion claiming to live or work locally (or both) is about the average for the total survey, although rather more than expected both live and work locally. Travel time for most (93%) was under and hour but rather more than expected had travelled over half an hour to be there on that day.

Table 10: How Local?

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

	Average %	Walworth Road %
Living Locally	52	29
Working Locally	14	10
Both	17	36
Those who travelled...		
Less than 30 minutes	74	62
Between half & one hour	22	31
1 to 2 hours	3	7
Over 2 hours	1	0

Visitors to Walworth Road travel a bit longer than average

5.2 How did they get here?

Walworth Road is a major bus route through South East London so it is hardly surprising that almost a fifth had travelled there by bus. Table 11 shows a slightly atypical picture however since about a third of the sample had come by car, and far fewer than expected had walked.

The picture is surprising since unlike the other high streets, here we see a local population using the centre because it is convenient, but choosing to access it by car.

Table 11: Transport

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

	Average %	Walworth Road %
Car	11	**31**
Walk	48	**26**
Bus	22	**21**
Cycle	6	**12**
Train	6	**7**
Tube	5	**2**
Taxi	1	**0**
Other	0	**0**

- almost a third arrived ***by car***

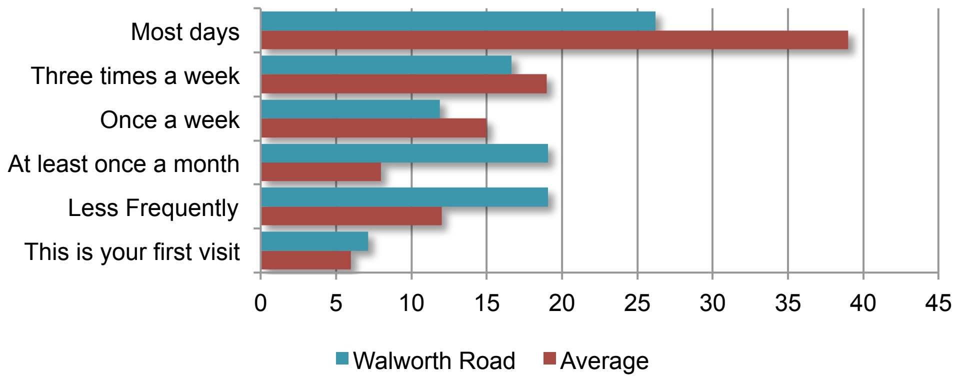
6. Consumer Behaviour

6.1 Frequency and Dwell Time

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

Figure 4 reveals that frequency of visit is below average, with almost half coming less frequently than once a fortnight. Unlike most high streets in the borough Walworth Road has fewer regular shoppers.

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 Walworth Road are most likely to be longer than average. 50% of respondents intended to be there for over one hour, some for up to four hours. In comparison with other High Streets in the survey this is again unusual.

Table 12: Dwell Time
"How long have you spent or do you intend to spend here today?"

	Average	Walworth Road
Up to 15 minutes	22	12
15 – 30 minutes	26	21
30 minutes – 1 hour	21	17
1 – 2 hours	17	31
2 – 3 hours	4	10
3 – 4 hours	2	5
More than 4 hours	8	5

Destination for some: more than expected ***stay over an hour***

These values are still shorter than the average 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. Nevertheless, dwell time rather more than visit frequency seems to characterise the shopper on the Walworth Road.

6.2 Intended Purpose of visit

Respondents were asked what "the main purpose of their visit was today". 40% said they were shopping, 24% passing through, 30% eating, drinking or meeting friends, and 5% 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.

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 %	Walworth Road %
Shopping	45	40
	30	43
	75	***83***
Travelling through	23	*24*
	23	12
	46	***36***
Eating, Drinking, Leisure	18	31
	35	29
	53	***60***
Fitnesss, Health, Finance	6	*5*
	8	10
	14	***14***
Other	8	0
	4	7
	12	***7***

Over **eighty percent are shopping today.**

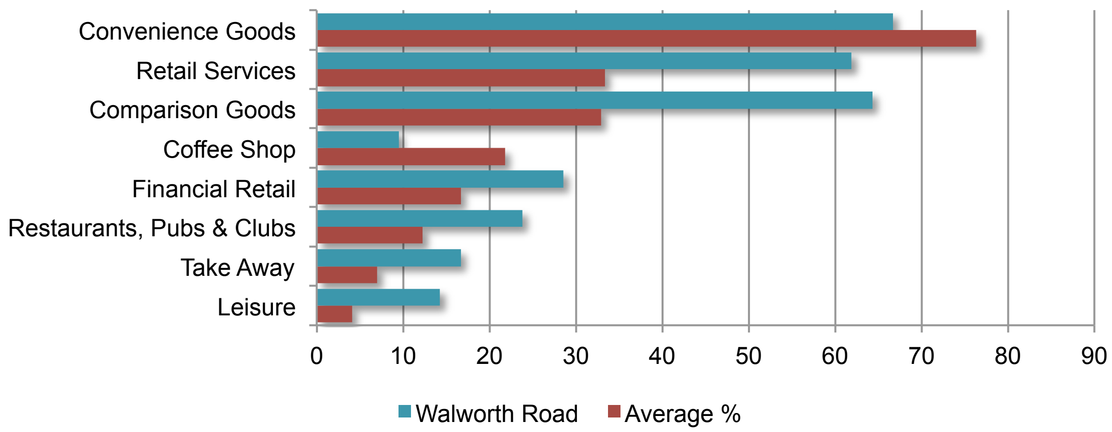
[1] Data source: http://www.exterionmedia.com/uk/what-we-do/our-media/retail-advertising

Over 80% said they would be shopping. Almost two thirds intended to visit a restaurant, café, pub or takeaway, or to meet friends, and 14% intended to use financial and other services. All scores are above survey average and suggest Walworth Road is a retail destination since fewer than expected replied that they were just passing through.

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

In addition to the intention questions reported in Table 13, respondents were later 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?



Fewer than expected had visited a convenience store, and very many more than average had spent money or visited comparison goods shops or services including banks and building societies, hairdressing salons and nail bars. A higher than expected number of respondents had spent time in foodservice outlets on that day.

These findings support the picture to some extent that Walworth Road is a destination trip rather more than a convenience-based retail centre.

6.4 Claimed Average Spend

Table 14 indicates that the average intended or claimed spend is high, with half expecting to part with over £30 on that day. Those spending under £20 are below the Southwark average.

Table 14: Claimed Average Spend

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

	Average	Walworth Road
	%	%
Less than £10	32	18
£10 - £20	29	10
£20 - £30	16	20
£30 - £40	10	20
£40 - £50	7	20
£50 - £70	4	10
More than £70	3	3

Average Spend is high

The average spend across all eight high streets shows that a third of all Southwark shoppers intended to spend less than £10 per visit to any high street. Walworth Road appears to have almost half the number of shoppers in that band.

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. Walworth Road appears to fit this description, and so its shoppers are ***more frequently found in other locations***.

Table 15: Duplication of High Streets

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

(n = 42)	Walworth Road	%
Peckham	6	14
Brixton	5	12
Westfield (Stratford City)	5	12
Camberwell	4	10
West End	3	7
Elephant & Castle	2	5
East Street	2	5
Deptford	1	2
Greenwich	1	2
Ilford	1	2
		71
12 alternatives		

Table 15 indicates the biggest high streets with which Walworth Road is competing for footfall. Three of the top four locations named are all destinations for comparison shopping, offering wide retail choice, often from big brand name retailers. They account for 50% of the named alternatives. After these the number of respondents identifying any one location declines rapidly. The total list of competing alternatives reaches 12, and most are local. This is a familiar pattern in retail gravitation models where the busiest locations with the easiest access are the biggest competitors. Most Walworth Road shoppers can also be found in Camberwell, the West End, Brixton, Peckham or Stratford Westfield. This is hardly surprising, but it means that the shoppers on Walworth Road at any one time are comparing it to these destinations – and if it is found wanting it will lose footfall.

6.6 Consumer Behaviour: summary

Walworth Road is a mid tier location in terms of footfall, and the fourth busiest high street in this survey. Visitors are very likely to live and/or work locally and to arrive after lunchtime. Walworth Road is a convenient walk or short bus ride away, yet many visit by car, although they do so infrequently. More shoppers visit foodservice outlets and comparison goods shops than expected and they spend more money and time in the area than is usual on other high streets. They appear to regard Walworth Road as a shopping destination more than a high street they pass through.

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 Walworth Road.

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 Walworth Road scores less strongly on convenience than other high streets, but more strongly on the range of places to eat and drink. The range of shops is slightly below average. The existence of a particular service is a draw for just 2% of visitors, but more than expected find parking easy.

Table 16: What's good….?

What most attracts you to this town centre?

	Average	Walworth Road
	%	%
Proximity or Convenience	**47**	33
Range of shops	**21**	19
Range of places to eat or drink	**10**	26
Attractive environment	**7**	12
A specific retailer or service	**4**	2
Ease of Parking	**2**	5
Other	**10**	2

On this basis any retailer or café must stand out above competitors beyond the high street because the nature of shopping on Walworth Road suggests broader competition. This makes it tougher to draw more trade.

When asked specifically what they thought might be improved or what they felt was missing, the biggest gripe by far was expressed by almost a third of shoppers; a wider range of stores. In aggregate, a further 20% suggested more choice in restaurants, cafes, pubs and bars. No other attributes attracted substantial opinion.

This is a worrying finding – while some are satisfied with the retail offer, it appears rather more are dissatisfied, and if Walworth road is to prosper as a destination it must be able to draw shoppers on more occasions from other retail centres.

Table 17: What's bad…..?

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

	Walworth Road	
Respondents	***42***	
A Wider Range of Stores	**12**	29%
Leisure Activities	**6**	14%
Variety of Restaurants	**4**	10%
Cafes	**2**	5%
Bars & Pubs	**2**	5%
Cinema	**2**	5%
Bank/ATM	**1**	2%
Social & Community	**1**	2%
Transportation & Public Realm	**0**	0%
Parking	**0**	0%
Parks & Green Space	**0**	0%
Gyms	**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.

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 average responses and compares these with the Walworth Road results. The strong response for TV is probably unhelpful, apart from emphasising its reach for mainstream advertisers, but the table provides some useful insights.

Media reach on the Walworth Road is typical in its ranking but not in its distribution. Online channels are powerful, perhaps reflecting the age of the sample. Radio and Word of Mouth are also prominent. After these channels (including TV) nothing has much reach – unlike the findings in other high streets where readership of local press was high.

This is encouraging for businesses with the time and experience to conduct a social media campaign because it might serve to create a buzz around a particular service and could attract customers to one business, or on a broader scale to generate footfall across the location.

Table 18: Local Media Reach

Where do you mainly get your local news from?

	Average %	Walworth Rd %
TV	32	38
Other Online	15	26
Word of Mouth	15	12
Radio	8	12
Southwark News	7	2
S.E.1 Magazine	2	2
South London Press	7	0
Other (Traditional)	8	0
Southwark Life Magazine	1	0
Southwark Business Today	0	0
Southwark & Bermondsey News	2	0

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were low: about 11% could recall such advertising, and were then prompted to describe it. Table 19 lists the various responses, which are also then individually negligible. The named events and their advertising may have been separated in time by a few months and memories decay, but the list reflects a mix of individual business activities and community driven events.

In some ways this also describes the population on any high street: they are there for very wide ranging reasons, and they are all likely to have wide ranging cultural interests..

Table 19: Local Advertising Recall
"Have you seen any advertising for local events recently?" Which events?"

(n = 42)	Walworth Road %
Yes	11
When Prompted:	
Doctor surgery	1
Karaoke in the Pub	1
Lambeth Orchestra	1
Milkshakes event at Ministry	1
Peckham peculiar	1

8.3 Community Engagement

When asked to recall any community or local events they had attended in the past year, the response was higher: around 21%.

The question generated a different list of events from the respondents. Several visitors were able to recall cultural and community events but these were entirely from outside the Walworth Road area. This indicates engagement with both community and commercial activities, but not in any way with the local community or that would drive footfall towards this centre.

Table 20: Community Engagement
"Which local events have you attended in the past year?"

(n = 42)	Walworth Road
Carnival	1
Cat Lovers w/ Harry Wolfman	1
Crossbones Graveyard	1
Elephant and Castle Shopping Centre	1
Late at Tate Exhibition (Tate Modern)	1
Printmaking (Morley Gallery)	1
Surrey Docks City Farm	1
The South London Gallery	1
Volunteer Job	1
Total	9
(Non-response = 79%)	

8.4 Promotional Reach

Finally and most surprisingly Table 21 indicates an extremely high engagement with promotional marketing tools online and traditional. The table is ordered by the average scores for the borough, which are low at 32%. Walworth Road shoppers are very likely to take advantage of these mechanics, with the most claiming to have engaged with digital tools. The numbers indicate that many had used more than one promotion during the visit. Again, this is so atypical that it either reflects a strong sampling bias, or a real variance in the way Walworth Road is being shopped.

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

	Average %	Walworth Rosd %
Coupons	7	26
Social media promotion	7	43
Email Promotion	6	33
Store Locator	4	14
Service Locator apps	4	19
Voucher apps	3	14
QR Codes	2	12
Total	32	

9. Conclusion

The data collected on the Walworth Road lead us to conclude the following:

- **Footfall density is comparatively high.** On average *850 people per hour* pass up or down Walworth Road, which is the fourth busiest location in the survey. Peak flows occurred after lunch on Saturday and Tuesday. Almost all intended to spend money, even those just “passing through” – 80% were shopping and 60% looking for food or drink.

- **Local customers, but infrequent high value visits.** The biggest advantage for businesses on Walworth Road is the convenience of the location for a large catchment of local shoppers. The challenge might be to encourage more frequent visits, since unlike most high streets in this survey, shoppers appear to visit the Walworth Road infrequently, but with a high average spend. They go to other local centres too, so the business community may wish to investigate measures to drive up visits per shopper.

- **Relationship building.** If shoppers visit less than once a month it is difficult for independent businesses to establish strong face to face relationships They must however create some advantage over shops on other local high streets perhaps through service-based innovations, or product based advantages 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 and they can research their total customer base over time and react to its needs easily.

- **Be distinctive.** Shoppers appear to be willing to stay longer and spend more. Businesses that can cater to this need and stand out from the crowd may be able to increase customer numbers for themselves, and drive footfall on the high street. In Walworth Road it appears the word can be spread effectively through social media and this can be effective for a business that wants to become distinctive.

- **Be local.** The customer base is predominantly local: they appear to visit for the amenities, but they could visit more often on the basis of convenience or better matching of needs and wants. There is a desire for a greater variety of stores and catering establishments. This might suggest an opportunity for a local entrepreneur. As a business group, it may suggests ways to encourage footfall through arranging and promoting advertised events in the local press, perhaps based in East Street Market.