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**Elephant and Castle Shopping Centre
Redevelopment Equality Analysis –
Bowling Alley Survey Results: Final
Report**

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1 INTRODUCTION

1.1 Purpose

Southwark Council has commissioned AECOM to undertake additional customer surveys of the London Palace Superbowl as part of the Equality Analysis of the Elephant and Castle Shopping Centre Regeneration Scheme. This analysis presents the results of the customer survey and considers how the redevelopment and any associated decision by the Council's cabinet to proceed with a CPO could impact on bowling alley customers sharing protected characteristics.

This process will support Southwark Council to fulfil its Public Sector Equalities Duty¹ in relation to any future decision to exercise CPO powers.

1.2 Background of Elephant and Castle Opportunity Area

The Elephant and Castle, located in the London Borough (LB) of Southwark, has been identified as an Opportunity Area in Southwark Council's Core Strategy² and the London Plan³. The Greater London Authority has defined Opportunity Areas as "London's major source of brownfield land with significant capacity for new housing, commercial and other development linked to existing or potential improvements to public transport accessibility"⁴.

The Elephant and Castle Opportunity Area covers 122 hectares, as outlined in the Elephant and Castle Supplementary Planning Document (SPD), which was subject to equalities impact assessment. This includes the Elephant and Castle Shopping Centre, Elephant Square, Elephant Park, Walworth Road, the Pullens Estate, West Square, St George's Circus, the Enterprise Quarter, and the Newington and Rockingham Estates⁵.

A key part of the regeneration of Elephant and Castle is the shopping centre. This was opened in 1965 and was the first covered shopping mall in Europe. Unfortunately the original design principles have not stood the test of time, and the adopted SPD provides a planning framework for the redevelopment of the site to transform the character of the town centre and improve its appeal as a shopping destination to a wider catchment area.

The Equality Analysis⁶ of the Elephant and Castle Shopping Centre Redevelopment revealed that businesses currently located within the shopping centre comprise a wide range of business types providing both goods and services. There are also approximately 15 businesses located within the railway arches, excluding two businesses located in the arches that have access to the shopping centre and two businesses that have access at the railway station. These businesses comprise a mix of business types that provide a range of goods and services to the local community.

1.3 London Palace Superbowl

London Palace Superbowl bowling alley is located on the upper floor of Elephant and Castle Shopping Centre (full postal address is Elephant & Castle Shopping Centre, First Floor, New Kent Rd, London, SE1 6TE). The licensed venue is open seven days a week and free parking is provided on site.

The bowling alley is primarily used by residents who live in Southwark and provides leisure and entertainment facilities to a diverse range of customers. In order for Southwark Council to fulfill its Public Sector Equalities Duty, any impact on these customers, including customers sharing protected

¹ Southwark Council is required by UK law to pay due regard to advancing equality, fostering good relations and eliminating discrimination for people sharing certain protected characteristics, as set out in the Public Sector Equalities Duty (2011) (under section 149 of the Equalities Act 2010).

² Southwark Council (2011) *Core Strategy* [online] available at: http://www.southwark.gov.uk/downloads/download/2648/documents_for_core_strategy_adoption, accessed November 2015.

³ Greater London Authority (2011) *The London Plan* [online] available at: <http://www.london.gov.uk/priorities/planning/london-plan>, accessed November 2015.

⁴ Available at: <https://www.london.gov.uk/priorities/planning/opportunity>

⁵ Southwark Council (2012) *Elephant and Castle Supplementary Planning Document* [online] available at: https://www.southwark.gov.uk/downloads/download/2896/elephant_and_castle_spd_supporting_documents

⁶ Southwark Council (2016) *Elephant and Castle Shopping Centre Redevelopment Equality Analysis* [online] available at: http://www.2.southwark.gov.uk/download/downloads/id/14484/elephant_and_castle_shopping_centre_equalities_analysis

characteristics⁷, must be fully understood before any decision could be taken by the Council's cabinet as to whether a CPO is justified.

1.4 Report structure

This report is structured as follows:

- Chapter 1: Introduction
- Chapter 2: Methodology
- Chapter 3: Analysis of survey results
- Chapter 4: Conclusion

⁷ These are the grounds upon which discrimination is unlawful. The characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. Although the socio-economic duty part of the Equality Act 2010 was not implemented by the government, Southwark Council's approach to equality also considers socioeconomic disadvantage.

2 METHODOLOGY

2.1 Introduction

The methodology for undertaking the customer survey and compiling this report comprised the following stages:

- survey design;
- implementation and analysis of the customer survey results; and
- preparation of this report.

This research has been conducted with the application of best practice approaches to Market and Social research in accordance with AECOM's position as a Market research Society Company Partner. This ensures that all research is conducted within industry guidelines, ensuring that sampling is robust and that data is collected and handled in accordance with the Data Protection Act (with which AECOM is also registered).

2.2 Survey design

The survey was designed in order to gather the views of customers who will be potentially affected by the proposed redevelopment of the Elephant and Castle shopping Centre. A copy of the customer survey can be found in **Appendix A**.

The survey closely mirrored the customer survey developed as part of the Equality Analysis in order to help facilitate comparison of results. However, in order to capture new baseline data to understand more about who uses London Palace Superbowl, additional questions were included and other questions were amended. Similarly, the survey was of a structured design that captured a combination of quantitative and qualitative information. This approach helped to ensure that relevant factual information was collected, whilst also allowing respondents to share their views on the bowling alley and the proposed redevelopment. A series of demographic questions were also included, although these questions were asked for qualifying respondents only (see Section 2.4 below for further details).

The implementation of the customer surveys adhered to best practice principles of survey design. This included the avoidance of leading and double-barrelled questions, careful choice of wording (e.g. clear, lay language) and type (e.g. closed, open), the application of logical sequencing and simple layout, and consideration of questionnaire length.

2.3 Conducting the surveys

The face-to-face surveys were conducted with customers of London Palace Superbowl. The fieldwork was conducted on site from 21st July 2017 to 4th August 2017 and all interviews were conducted by trained market research interviewers who were contracted by AECOM. The staff are engaged as individuals and briefed and managed by AECOM, but are paid by a third party payroll company (Morson). In order to ensure maximise response shifts were scheduled to take place in the evening peak period between 4pm and 8pm.

In total **121 customers** of the bowling alley were interviewed. Respondents were stopped at random and asked to participate in the survey and no screening criteria was applied. Interviewing took place in the area directly outside the bowling premises – in agreement with the property managers and London Palace Superbowl owners (Palatial Ltd). The property management team at Elephant and Castle Shopping Centre and the owner of the bowling venue were contacted in advance (around 2 weeks prior to the commencement of the fieldwork) and was provided with a Letter of Authority (**Appendix B**), which was pre-agreed with Southwark Council, to legitimise the activities of the interviewers and to instill respondent confidence in the purpose and independence of the survey.

The customer surveys were conducted with members of the general public who were recruited 'on street' for convenience - i.e. stopped and asked to take part near the entrance to the bowling alley. All of those interviewed use or were using the bowling alley on the day of the interview.

All interviews were conducted on tablets through a scripted questionnaire which enforces routing and logic checks at data collection. The results are captured and automatically submitted to generate the resultant dataset. These data were then checked, cleaned and coded in the case of open-ended responses.

2.4 Limitations and constraints

Information provided by Southwark Council indicated that use of the bowling alley peaks on Friday and Saturday evenings with around 150 customers visiting on a Friday and around 80 on Saturday. Sundays and other weekdays were estimated to have a footfall of around 40 people. Therefore the mean use per week was estimated at around 440 visits per week. This estimate includes children. Therefore recruitment of a sample group was set to achieve a viable sample size rather than a defined proportion of the user group.

In total **121 interviews** were completed. The degree of confidence we can place on this is demonstrated in the table below:

Table 2.1 Table demonstrating confidence intervals associated with sample size

Sample Size	Confidence Intervals (95%)	Confidence Intervals (95%)	Confidence Intervals (95%)
	50% Viewpoint	25% Viewpoint	10% Viewpoint
	%	%	%
(121)	+/- 8.9%	+/- 7.7%	+/- 5.3%

The nature of the customer survey and the small total eligible population size mean that results are not intended to be generalised more widely and the responses can be seen as indicative. Similarly, the random nature of the on-street survey sample limits the reliability of responses as it is not weighted nor were quotas applied to be reflective of any population – it is meant to provide an indicative response of general users of the Bowling alley. As a result caution should be taken in interpreting the on-street survey data findings, and these cannot be generalised to represent views of the wider population.

3 ANALYSIS OF SURVEY RESULTS

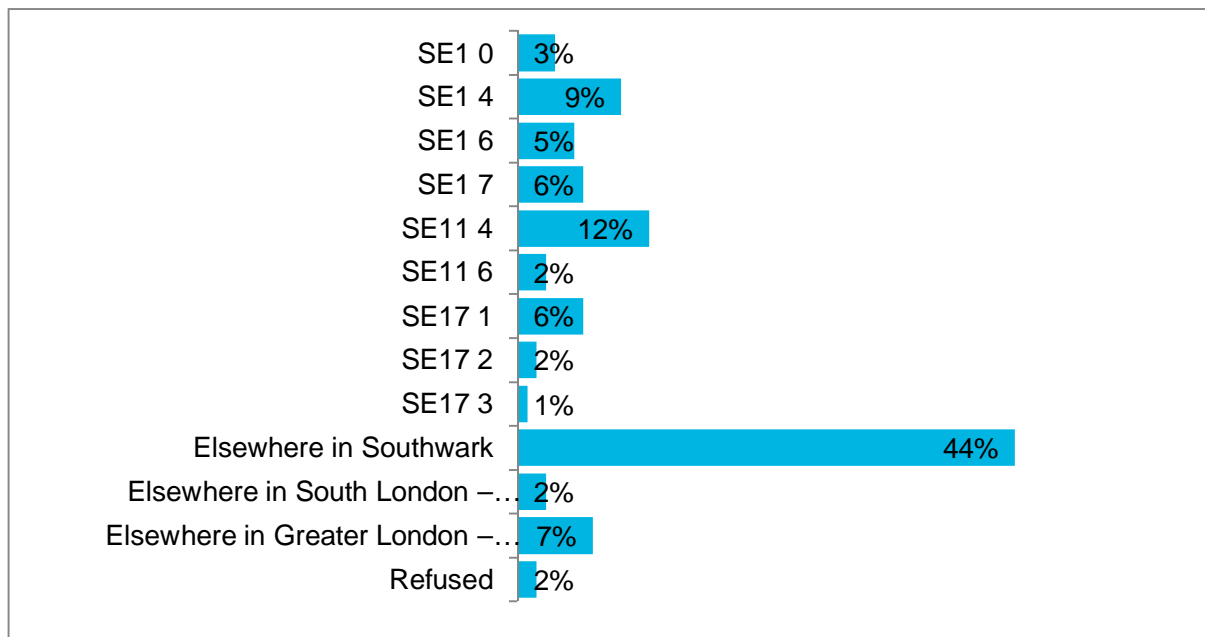
3.1 Introduction

This chapter presents findings from the customer surveys conducted by AECOM with customers using London Palace Superbowl.

3.2 Customer survey results

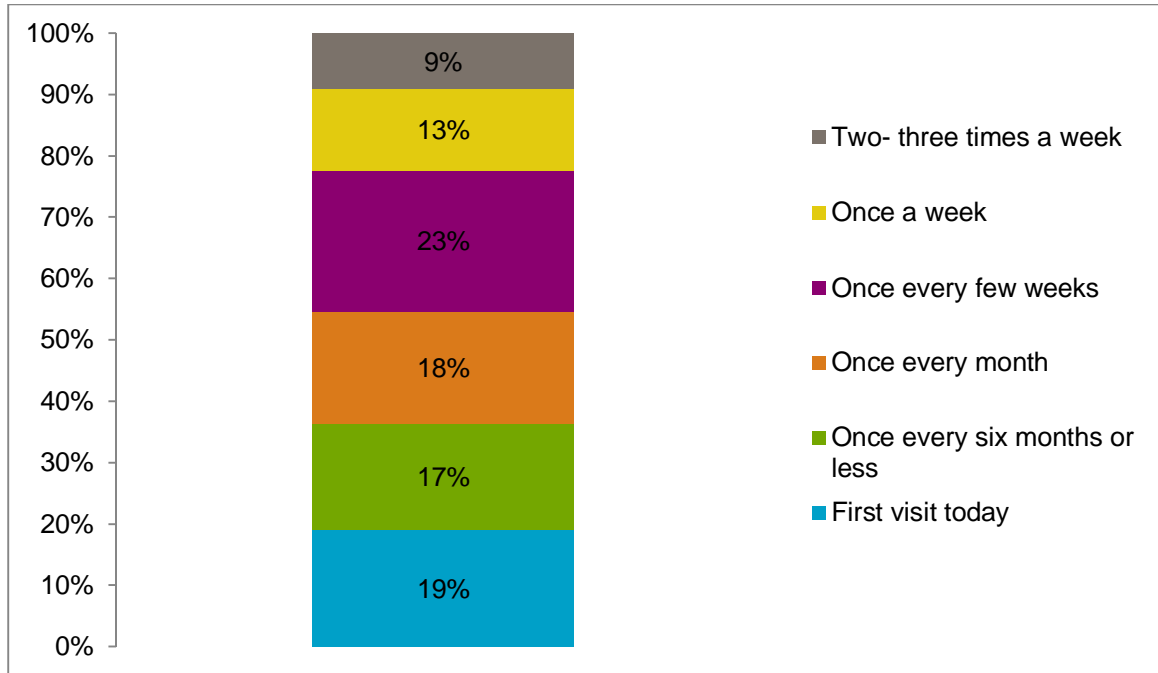
In total 121 interviews were conducted with users of the bowling alley. In order to understand the geographic profile of those using the site, all respondents were asked where they live. Almost nine in ten of those interviewed (89%) stated that they reside in the London borough of Southwark.

Figure 3.1 Geographic Profile of Bowling alley users - Base (121)



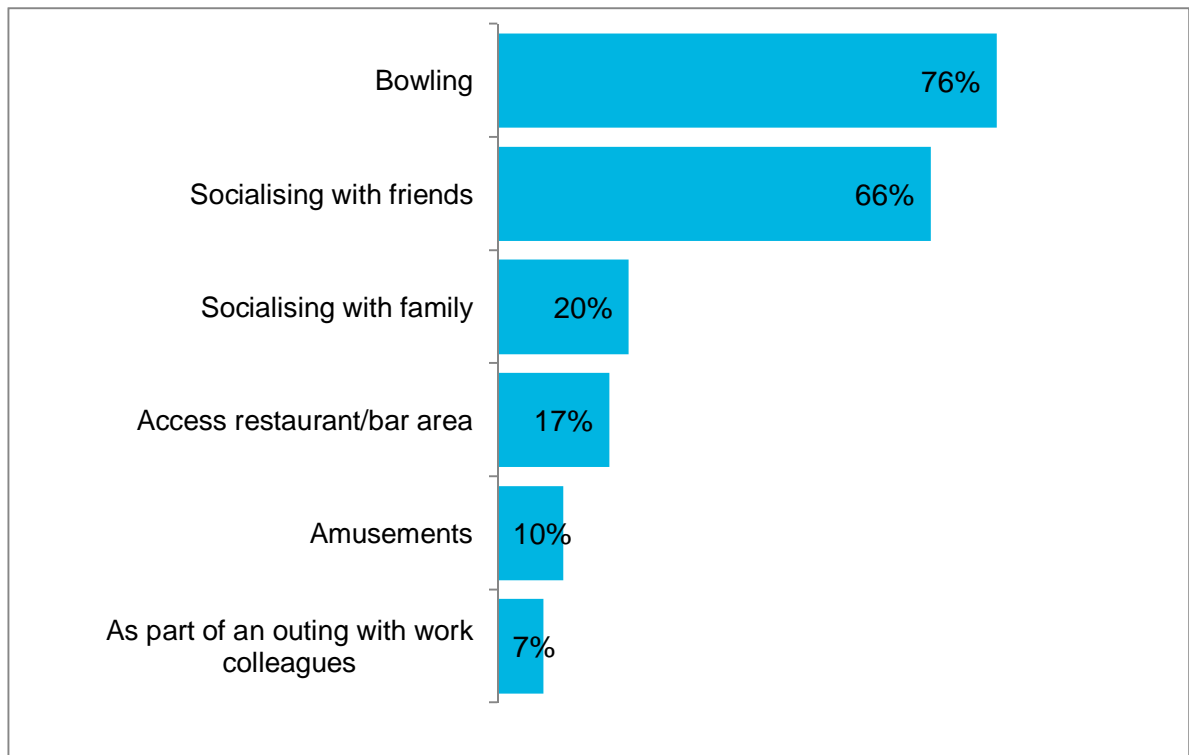
Around a fifth (22%) of those interviewed stated that they visit the bowling venue at least once a week. In total 64% of survey participants visit at least once a month. A fifth (19%) of those interviewed were making their first visit to the venue on the day of the interview.

Figure 3.2 Frequency of use profile of regular Bowling alley users - Base (121)



When asked what their main reasons for visiting the bowling venue were besides bowling (76% of replies), socialising with friends was cited by two thirds of users (66%).

Figure 3.3 Reasons for visiting Palace Bowling on day of interview- respondents could choose more than one reason - Base (121)



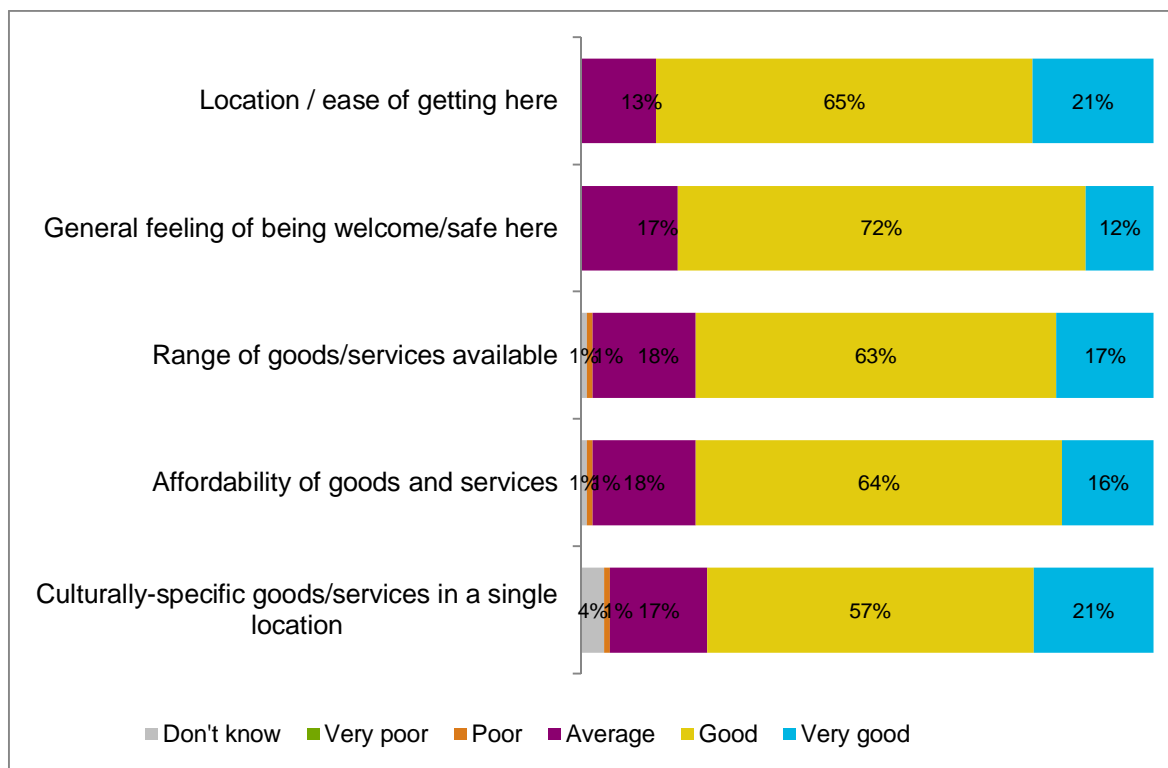
Twenty seven out of the total sample group (22%) visit other bowling venues in the area. Those visited are shown in the table below:

Table 3.1 Other Bowling venues visited – count shown due to low response - Base (27)

Bowling venues	Count
MFA Bowl Lewisham (11 to 29 Belmont Hill, Lewisham, Greater London, SE13 5AU)	9
Hollywood bowl Surrey Quays (Surrey Quays Leisure Park, Surrey Quays Road, Surrey Quays, Greater London, SE16 2XU)	9
Namco Funscape London (County Hall Riverside Building, Westminster Bridge Road, Southwark, Greater London, SE1 7PB)	7
Tenpin Croydon (Valley Park Leisure Complex, Hesterman Way, Croydon, Greater London, CR0 4YA)	2
Other venue not listed	5
Total	(27)

Elephant and Castle is rated most positively by respondents on the attribute of ‘location/ease of getting here’ with 86% rating it as ‘good’ or ‘very good’ on this attribute. Over eight in ten respondents (84%) feel safe and welcome when visiting Elephant and Castle.

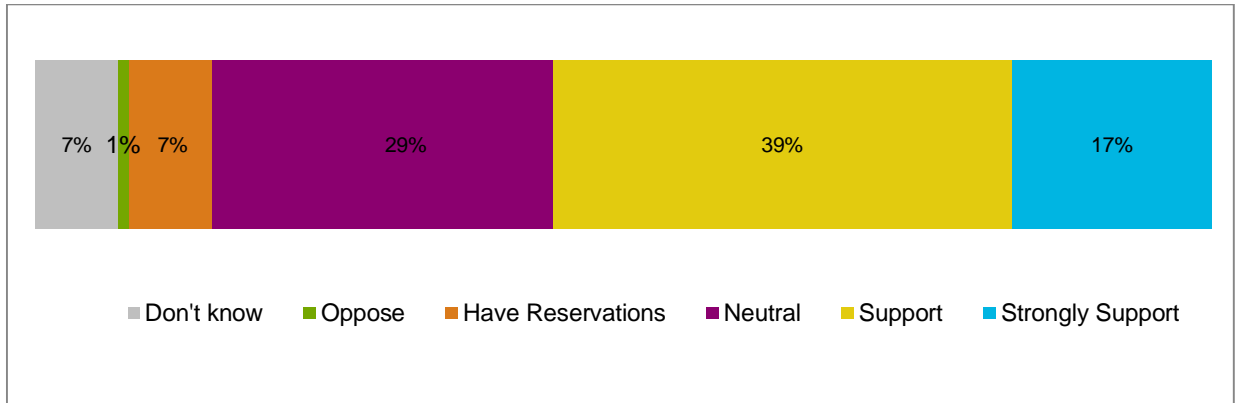
Figure 3.4 Rating of Elephant and Castle on various attributes- attributes ranked on ‘very good’ rating



Forty five percent of respondents were aware of the planned redevelopment of Elephant and Castle shopping centre. There is no statistically significant link between awareness of the development and frequency of use of the bowling alley.

When all survey participants were given a brief description of the planned changes over a half (56%) support or 'strongly support' them, 29% gave a neutral response and just 1% opposed the plans.

Figure 3.5 Extent of support for redevelopment proposals - Base (121)



All participants were then asked to expand on why they support/oppose or have no particular feelings towards the regeneration of Elephant and Castle shopping centre.

Several of those who stated that they oppose or have reservations about the redevelopment asked what would become of the bowling alley and wider shopping centre.

A few respondents expressed some skepticism about the cost of rents and the development being more about gentrification of the area changing the character of the place.

Table 3.2 Reasons given by those in opposition to/have reservations about redevelopment—multiple response possible: Open question coded - Base (9)

Reason for Having reservations/ opposing redevelopment		
Oppose	This is only going to be place for rich people new flats will be sold to rich people	1
Have Reservations	Where they will move the bowling/ shopping centre?	4
Have Reservations	If this will improve ordinary citizen life I will support it	1
Have Reservations	This is all for 'big people' this is going to make money for them	1
Have Reservations	They will just build the expensive houses and the rent for shops will 'high rocking'	1
Have Reservations	Need to include social housing in scheme	1
	Total	9

Those who expressed neutral sentiment towards the redevelopment tended to make positive remarks regarding the potential of the scheme to improve Elephant and Castle – 21 responses related to this. Five responses mentioned that the scheme will bring more shops to the area, and a further two comments related to new businesses in the location.

However, five comments expressed some scepticism about the ability of the scheme to deliver what it promises. Two comments related to the need for social housing as part of the scheme.

Table 3.3 Reasons given by those expressing neutral sentiment – multiple response possible: Open question coded - Base (35)

Reason for expressing neutral sentiment towards redevelopment - coded	
Think it will improve area	21
Will bring more shops	5
Scepticism about ability of redevelopment to deliver	5
Need Social housing	2
Will bring businesses to the area	2
Want Westfield style mall - not campus development	1
Total	(35)

Six in ten of those who stated that they support redevelopment to some degree felt that it will improve the area and bring more opportunities for people.

The installation of new shops and leisure facilities was cited as a positive attribute of the development for 34% of those who support the scheme.

Ten replies (or 15% of responses) were related to the need for more housing and a further 3 replies specified the need for social housing allocation within the opportunity area.

Just one reply was related specifically to including a bowling facility within the new development.

Table 3.4 Reasons given by those expressing support/strong support for the scheme: Open question coded, multiple response possible - Base (68)

Reason for expressing support/strongly support sentiment towards redevelopment - coded		
Think it will improve area/need regeneration/will bring opportunity	41	60%
Will bring more shops/leisure facilities	23	34%
More housing is welcomed	10	15%
Need Social housing/how will this benefit local people	3	4%
Transport links are already good/need to link to rest of London	2	3%
Will bring businesses to the area	1	1%
Hope bowling will be included in development	1	1%
Total	(68)	

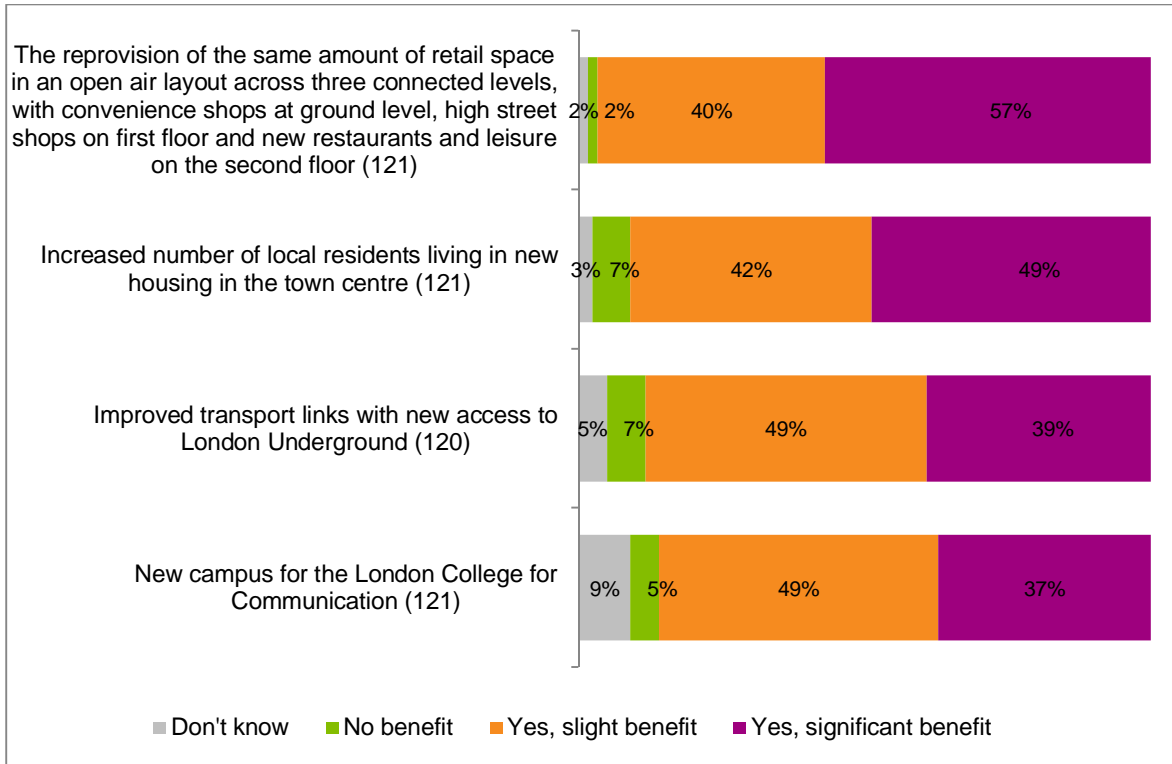
All survey participants were given further details about aspects of the scheme and asked to what extent they felt that they would bring benefits to the new Elephant and Castle town centre.

The new shopping and leisure complex was felt to bring the most benefit to businesses at the new centre, with over half (57%) of respondents feeling that this will bring significant benefits.

Almost half (49%) of respondents felt that the provision of new housing for local residents in the new town centre would bring significant benefits.

The new campus for the London College of communication was thought to bring benefits by 86% of respondents.

Figure 3.6 Potential for aspects of the scheme to bring benefits - Base (121)



All respondents were asked what impact (if any) they felt the proposed redevelopment of this site might have on the local community in Elephant and Castle. The responses to this open question have been coded and are shown in Table 3.5 below.

Many of the responses were positive. Just under half of participants stated that the redevelopment will be good for the local area and will bring prosperity (46% of replies).

‘It is good initiative to redevelop the shopping centre, will have more business and more opportunities’

‘It will be positive impact as with new development more opportunities will come’

Three in ten replies related to the improved provision of shops and facilities in the redevelopment. Just over one in ten positive replies (11%) relate to the scheme bringing more opportunities for local people, while 13% feel that it will bring jobs to the area.

‘It might improve local people life and create more jobs’

Table 3.5 Impacts of proposed redevelopment on local people: Open question coded – multiple response possible Base: (121)

Impacts on local community - coded		
Good for local area/will bring prosperity	56	46%
More shops will be good/improved shops/better facilities will be better	36	30%

Will bring jobs	16	13%
Will bring more opportunities locally	13	11%
Negative sentiments	11	9%
Will bring tourism/more visitors to area	7	6%
Will bring housing	5	4%
Will bring more business	4	3%
Low community impact - can shop elsewhere	1	1%
Don't know	2	2%
Total	(121)	

In terms of negative sentiment three of the eleven negative replies related to concern about the disruption and loss of facilities during the construction phase.

Two comments related to skepticism around the ability of the scheme to deliver for local people.

‘There will be no impact for local people this is only for rich people to make money’

‘It will be successful but for money makers not for local people’

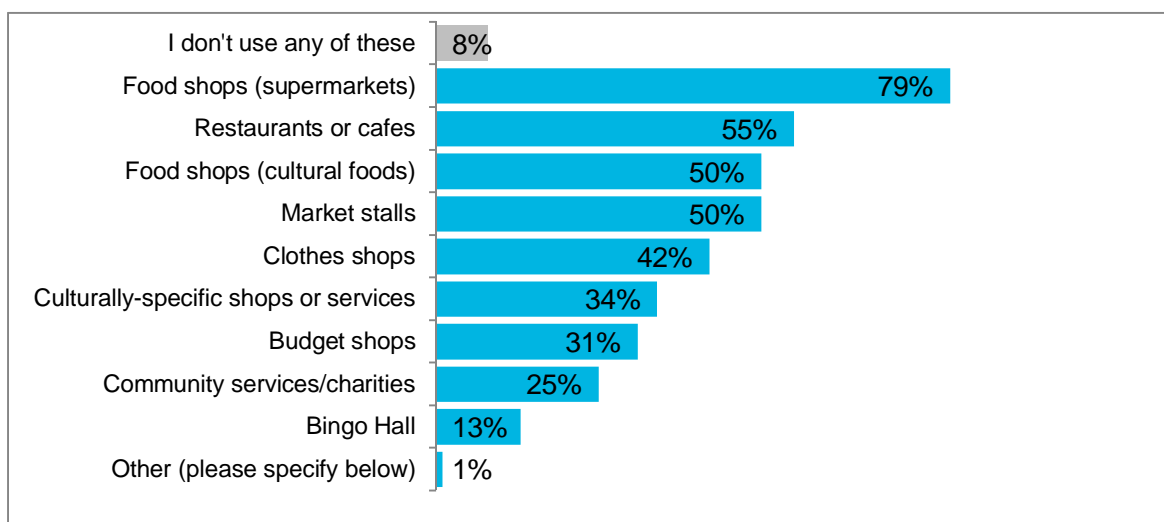
Other respondents were concerned about the impact on small businesses.

‘It will kick out the small businesses’

‘With new development where the small businesses go?’

All respondents were asked to select what facilities they use within the shopping centre and then asked whether they have any concerns about the impact of the new development might be on the services they use.

Figure 3.7 Facilities in Shopping Centre and surrounds used by Palace Bowling users - Base (138)



All respondents who use facilities in the centre were then asked whether they have any concerns about the facilities they use and any impact of the redevelopment on them. Fifteen survey participants expressed concern about the facilities they use.

The proportion of respondents expressing concern about the facilities they use is relatively low – ranging from five to one individual response.

Table 3.6 Facilities bowling users raised concerns about - Base (15)

Facilities bowling users have raised concerns about	n	% concerned of those that use
Bowling alley	5	4%
Budget shops	5	13%
Culturally-specific shops	5	12%
Food shops (supermarkets)	5	5%
Food shops (cultural foods)	5	8%
Community services/charities	4	7%
Clothes shops	3	6%
Culturally-specific services	3	7%
Bingo hall	1	6%
Total	(15)	

When asked why they have concerns regarding the potential loss of these facilities the most commonly given reasons related to the loss of 'local' shops in the area. Due to the low response in this question this data is shown as verbatim comments below.

'What will happen to local people shops?'

'Are there going to be local shops or not in this shopping center'

'I am concerned what will happen to local food shops'

'They might not make local shops'

'What is going to happen to local shops they will be closed or not?'

The bowling users were then asked what they feel the main effects of the creation of a new town centre at Elephant and Castle will be for the users of the bowling alley. Responses to this question reflect some concern about the availability of alternative facilities in the locality amongst the sample group – 30 responses highlighted that there is no alternative bowling venue in Elephant and Castle and so people will have to go elsewhere, and 8 responses (7%) expressed concern about the impact of the construction period.

Responses to this question reflect the general uncertainty about the future of the bowling amongst the sample group – 21 or 17% of responses asked whether the venue will close. Twenty three or (19%) of responses assumed that the bowling will be upgraded in the redevelopment.

Fifteen responses (12%) stated that users will be upset or disappointed at the potential loss of the bowling venue.

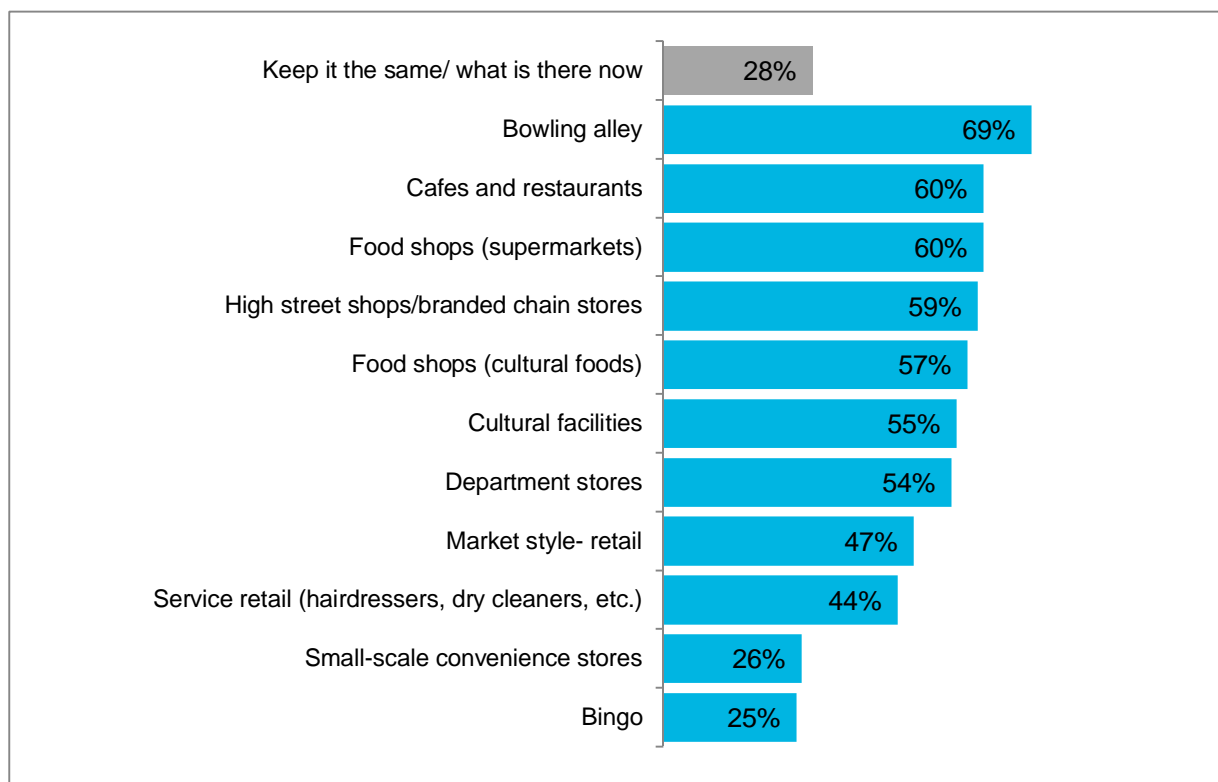
Table 3.7 Impact of regeneration on bowling users - open comments coded - Base (121)

Impact of regeneration on Palace Bowling users	n	%
People have to go elsewhere/no venue in Elephant and Castle	30	25%
Bowling will be upgraded/positive	23	19%
Uncertainty about future of the venue/will it be moving?	21	17%
People will be upset if it is closed	15	12%

Facilities/shops/housing/jobs will be better for local people	10	8%
Lack of facilities during construction	8	7%
Want to see bowling in new development	7	6%
No impact	3	2%
It will impact on bowling users - no sentiment	1	1%
Want Superbowl to stay in Elephant and Castle	1	1%
Concerned about high business rents in redevelopment	1	1%
Redevelopment effects everyone- no sentiment	1	1%
Don't know	13	11%
Total	(121)	

Perhaps unsurprisingly when asked what retail or leisure services bowling alley users would like to see in the new development, the most commonly cited response was bowling with 69% of responses (n=84). Six in ten respondents would like to see cafes and restaurants and/or supermarkets within the new development, while 59% would like to see more branded chain stores installed. Over half of respondents would like to see cultural food shops within the development (57%, n=69) and 55% would like to see cultural facilities.

Figure 3.8 Should the development go ahead what type of retail or leisure services would you like to see incorporated within it? Base (138)



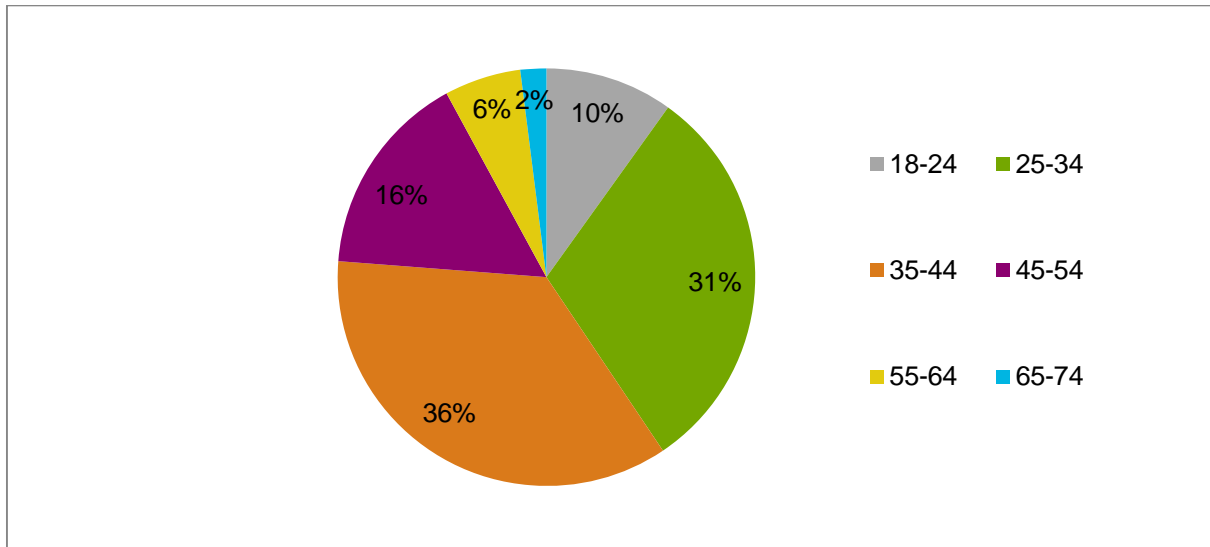
3.3 Demographic profile of response group

In terms of the gender profile of the London Palace Superbowl user sample group, there were more males than females, 70% (n=85) were male and 30%, n=36) were females.

One percent of the total sample group (n=1 of 121 respondents) consider themselves to have a disability.

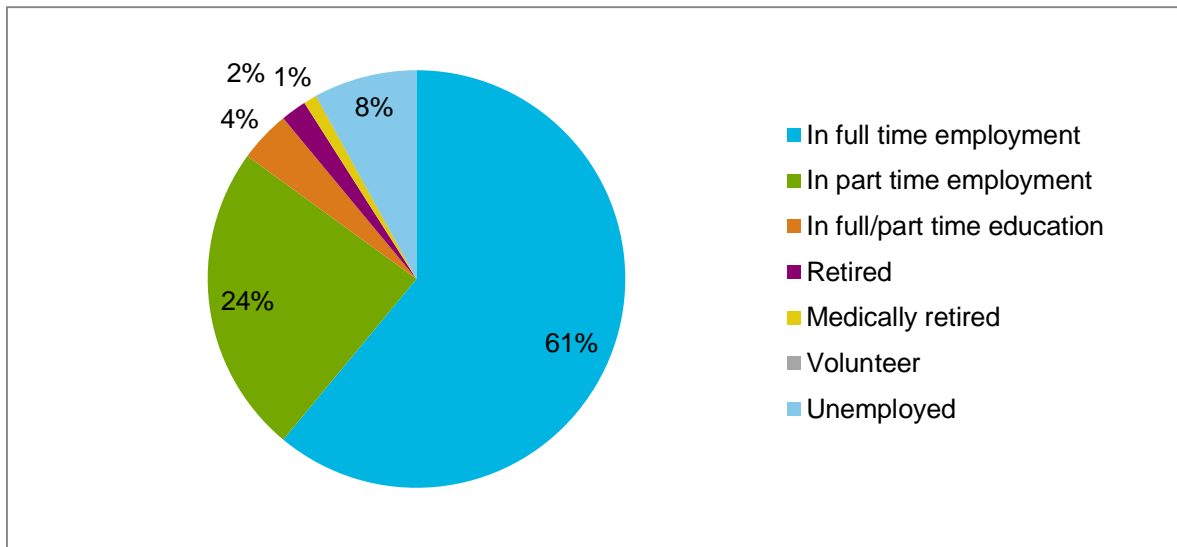
The age profile of the respondent group suggests that London Palace Superbowl is used primarily by those of conventional working age with 67% (n=81) aged between 25 and 44.

Figure 3.9 Bowling alley user response group - age profile Base (121)



Given the age breakdown of the response group it is perhaps unsurprising to find that the majority of respondents are employed in some capacity – 24% (n=29) are employed on a part time basis and 61% (n=74) work full time.

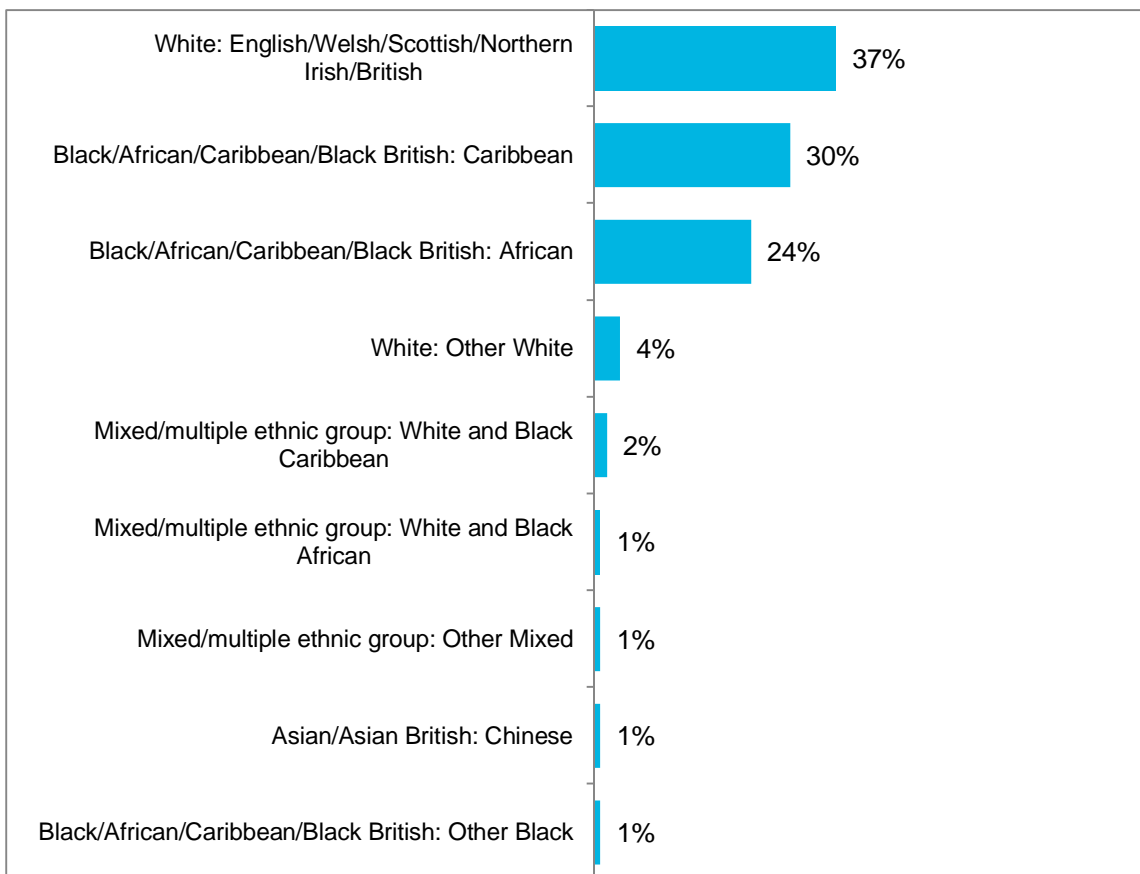
Figure 3.10 Bowling user response group - working status profile Base (121)



The respondent group constitutes those from various black and various white ethnic backgrounds. Those identifying as ‘White: English/Welsh/Scottish/Northern Irish/British’ make up just over one third of the sample (37%, n=45).

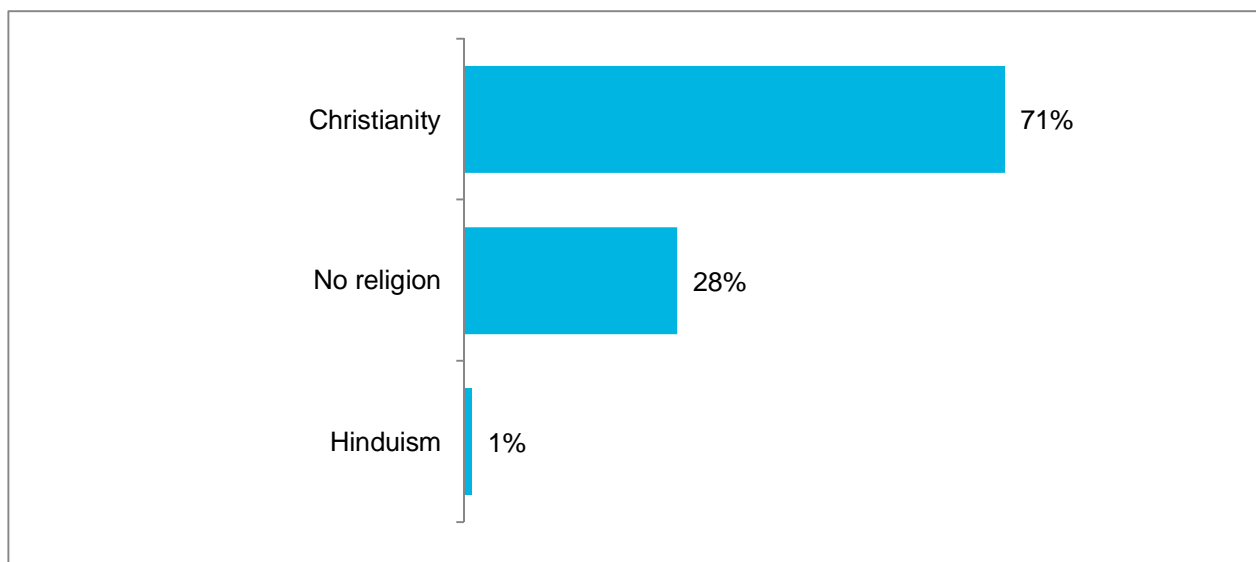
Respondents identifying as ‘Black/African/Caribbean/Black British: Caribbean’ are the second most represented group with 30% or 36 respondents. A quarter (24% or 29 individuals) of those taking part were from ‘Black/African/Caribbean/Black British: African’ backgrounds. This indicates that over half (54%) of customers are from Black Caribbean and Black African ethnic communities.

Figure 3.11 Bowling user response group - Ethnicity profile Base (121)



The majority of those who took part in the survey identify as Christian (71%, n= 86).

Figure 3.12 Bowling user response group - Religious belief profile Base (121)



4 CONCLUSION

4.1 Key findings of the survey analysis

The survey findings suggest that Palace bowling caters mostly for local clientele, with nine in ten of those interviewed (89%) stating that they reside in the London borough of Southwark. Just under a fifth of those interviewed (19% or n=23) were making their first visit to the bowling alley. Of those who have attended before, around a quarter (28% or n=27) visit at least once a week. Eight in ten (79%) visit at least once a month. A fifth (22%) of the sample group visit other bowling venues in the local area.

The age profile of the respondent group suggests that London Palace Bowling is used primarily by people of traditional working age with 83% (n=100) aged between 25 and 54.

In terms ethnicity, just over one third (37%) of respondents are from 'White: English/Welsh/Scottish/Northern Irish/British' backgrounds and this group make the most populous in the sample group in terms of ethnicity. Three in ten of those interviewed (30% or n=36) identify themselves as being from 'Black/African/Caribbean/Black British: Caribbean' backgrounds. The third most populous group within the sample was those from 'Black/African/Caribbean/Black British: African' backgrounds who make up 24% (n=29) of the sample group.

Two thirds of those interviewed stated that they visited for the purpose of socialising with friends (66% or n=80), and a further 20% (n=24) were socialising with their family. A smaller proportion 7% (n=8) were attending the bowling alley as part of an outing with their work colleagues on the day of the interview.

When all survey participants were given a brief description of the planned changes over a half (56%) support or 'strongly support them, 29% gave a neutral response and just 1% opposed the plans. The bowling users were also asked what they felt the main effects of the creation of a new town centre at Elephant and Castle will be for the users of the bowling alley. Responses to this open question reflect some concern about the availability of alternative facilities in the locality amongst the sample group – 30 responses highlighted that there is no alternative bowling venue in Elephant and Castle and so people will have to go elsewhere, and 8 responses (7%) expressed concern about the impact of the construction period.

Responses to this question reflect the general uncertainty about the future of the bowling alley amongst the sample group – 21 or 17% of responses asked whether the venue will close. Twenty three or (19%) of responses assumed that the bowling will be upgraded in the redevelopment. Fifteen responses (12%) stated that users will be upset or disappointed at the potential loss of the bowling venue.

APPENDIX A: CUSTOMER SURVEY

Elephant and Castle shopping centre usage survey

This survey is being conducted by independent Market Research agency AECOM who have been commissioned by Southwark Council to complete an Equalities Analysis to help them better understand use of Elephant & Castle Palace Superbowl, located within the Elephant & Castle Shopping Centre. This survey is part of the standard consultation process undertaken with any community affected by a large development proposal. All responses are confidential, and no individual will be identified.

Q2 To enable us to map use of Elephant & Castle Palace Superbowl it would be great if you could tell us what postcode area or area you live in. You will not be contacted.

Refused	<input type="checkbox"/>
SE1 0.....	<input type="checkbox"/>
SE1 4.....	<input type="checkbox"/>
SE1 6.....	<input type="checkbox"/>
SE1 7.....	<input type="checkbox"/>
SE11 4.....	<input type="checkbox"/>
SE11 6.....	<input type="checkbox"/>
SE17 1.....	<input type="checkbox"/>
SE17 2.....	<input type="checkbox"/>
SE17 3.....	<input type="checkbox"/>
SE5 0.....	<input type="checkbox"/>
Elsewhere in Southwark	<input type="checkbox"/>
Elsewhere in South London – specify borough Please write in box below:	<input type="checkbox"/>
Elsewhere in Greater London – specify borough Please write in box below:	<input type="checkbox"/>
Outside Greater London	<input type="checkbox"/>
Please type in London Borough: <input style="width: 300px; height: 20px;" type="text"/>	

Q3 How do you usually travel to Palace Superbowl? Please select the one main mode you use (longest duration).

On foot.....	<input type="checkbox"/>
By bike.....	<input type="checkbox"/>
By underground (tube).....	<input type="checkbox"/>
By train	<input type="checkbox"/>
By bus.....	<input type="checkbox"/>
Dial-a-ride	<input type="checkbox"/>
By car / motorbike.....	<input type="checkbox"/>
Other- please specify in box below.....	<input type="checkbox"/>
<input style="width: 300px; height: 20px;" type="text"/>	

Q4 How frequently on average do you visit the Palace Superbowl?

- First visit today
- Five days a week or more often
- Two- three times a week.....
- Once a week
- Once every few weeks
- Once every month
- Once every six months or less

Q5 Why are you visiting Palace Superbowl today?

- Socialising with friends.....
- Socialising with family
- As part of an outing with work colleagues
- Bowling
- Amusements.....
- Access restaurant/bar area.....
- Other.....

Q6 What are your main reasons for choosing Palace Superbowl? OPEN QUESTION- PLEASE PROBE

Q7 Do you visit other bowling venues in the area?

- Yes
- No.....

Q8 Which of the following other bowling venues do you use within (or around) Elephant & Castle shopping centre?

- Namco Funscape London (County Hall Riverside Building, Westminster Bridge Road, Southwark, Greater London, SE1 7PB).....
- MFA Bowl Lewisham (11 to 29 Belmont Hill, Lewisham, Greater London, SE13 5AU)
- Hollywood bowl Surrey Quays (Surrey Quays Leisure Park, Surrey Quays Road, Surrey Quays, Greater London, SE16 2XU)
- Tenpin Croydon (Valley Park Leisure Complex, Hesterman Way, Croydon, Greater London, CR0 4YA) ...
- Other (please specify below)

Q9 How frequently on average do you visit
 Namco Funscape London (County Hall Riverside Building, Westminster Bridge Road, Southwark, Greater London, SE1 7PB)

Just visited once

Five days a week or more often

Two- three times a week.....

Once a week

Once every few weeks

Once every month

Once every six months or less

Don't know

Q10 How frequently on average do you visit
 MFA Bowl Lewisham (11 to 29 Belmont Hill, Lewisham, Greater London, SE13 5AU)?

Just visited once

Five days a week or more often

Two- three times a week.....

Once a week

Once every few weeks

Once every month

Once every six months or less

Don't know

Q11 How frequently on average do you visit
 Hollywood bowl Surrey Quays (Surrey Quays Leisure Park, Surrey Quays Road, Surrey Quays, Greater London, SE16 2XU)?

Just visited once

Five days a week or more often

Two- three times a week.....

Once a week

Once every few weeks

Once every month

Once every six months or less

Don't know

Q12 How frequently on average do you visit
 Tenpin Croydon (Valley Park Leisure Complex, Hesterman Way, Croydon, Greater London, CR0 4YA)?

Just visited once

Five days a week or more often

Two- three times a week.....

Once a week

Once every few weeks

Once every month

Once every six months or less

Don't know

Q13 How frequently on average do you visit INSERT OTHER BOWLING VENUE {Q8a}

- Just visited once
- Five days a week or more often
- Two- three times a week.....
- Once a week
- Once every few weeks
- Once every month
- Once every six months or less
- Don't know

Q14 How do you rate Elephant and Castle Shopping Centre based on each of the following characteristics?

	Very poor	Poor	Average	Good	Very good	Don't know
Location / ease of getting here	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Range of goods/services available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Culturally-specific goods/services in a single location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affordability of goods and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General feeling of being welcome/safe here	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q15 There are proposed plans to redevelop Elephant and Castle Shopping Centre- were you aware of this before today?

- Yes.....
- No.....
- Don't know

Q16 The developer Delancey in conjunction with APG (a Dutch pension provider and asset manager) wishes to create a new town centre at Elephant & Castle including new shops, offices and leisure facilities as well as new homes for rent for people living and working in London and a new campus for London College of Communication, to what extent do you support these proposals?

- Strongly Support
- Support
- Neutral
- Have Reservations
- Oppose
- Don't know

Q17 Please indicate how far you agree that each of the following elements of the regeneration will be beneficial for businesses at the new Elephant and Castle town centre?
SHOWCARD F

	Yes, significant benefit	Yes, slight benefit	No benefit	Don't know
Improved transport links with new access to London Underground	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The reprovision of the same amount of retail space in an open air layout across three connected levels, with convenience shops at ground level, high street shops on first floor and new restaurants and leisure on the second floor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased number of local residents living in new housing in the town centre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New campus for the London College for Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q18 And why do you say that?

Q19 (Assuming it is successful) what impact (if any) do you think the proposed redevelopment of this site might have on the local community in Elephant and Castle?

Q20 In addition to Palace Superbowl, which of the following facilities do you use within (or around) Elephant & Castle shopping centre? *TICK ALL THAT APPLY IN*

- I don't use any of these
- Bingo Hall
- Budget shops
- Clothes shops
- Community services/charities.....
- Culturally-specific shops or services.....
- Food shops (supermarkets).....
- Food shops (cultural foods)
- Market stalls.....
- Restaurants or cafes
- Other (please specify below)

Q21 Do you have any concerns about the impact of a new development here would have on the facilities that you currently use at Elephant & Castle? Select those they have concerns about

- I have no concerns.....
- Bingo hall.....
- Bowling alley.....
- Budget shops.....
- Clothes shops.....
- Community services/charities.....
- Culturally-specific shops.....
- Culturally-specific services.....
- Food shops (supermarkets).....
- Food shops (cultural foods).....
- Market stalls.....
- Restaurants or cafes.....
- Other (please specify below).....

Q22 *ASK FOLLOW UP TO ALL THOSE WHO MENTION CONCERNS AT Q10B*
Why do you say you are concerned about {Q21}?

Q23 What do you think will be the main effects for the users of Palace Superbowl of the proposals for a new town centre at Elephant & Castle?

Q24 Should the development go ahead what type of retail or leisure services would you like to see incorporated within it? *Select all that apply*

- Keep it the same/ what is there now
- Bingo
- Bowling alley
- Cafes and restaurants
- Cultural facilities.....
- Department stores.....
- Food shops (cultural foods)
- Food shops (supermarkets).....
- High street shops/branded chain stores
- Market style- retail.....
- Service retail (hairdressers, dry cleaners, etc.)
- Small-scale convenience stores
- Other
- Other - please specify

Demographic section

Q25 Please record gender:

- Male
- Female.....
- Other.....

Q26 To which of these age groups do you belong?

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75 +
- Refused

Q27 Do you consider yourself to have a disability?

- Yes.....
- No.....
- Refused

Q28 Which of these best describes your current working status? *Tick one box only*

- In full time employment.....
- In part time employment
- In full/part time education.....
- Retired
- Medically retired.....
- Volunteer.....
- Unemployed.....
- Other.....
- other - please specify

Q29 Which of the following ethnic groups do you feel you belong to? *Tick one box only*

- White: English/Welsh/Scottish/Northern Irish/British.....
- White: Irish.....
- White: Gypsy or Irish Traveller
- White: Other White
- Mixed/multiple ethnic group: White and Black Caribbean
- Mixed/multiple ethnic group: White and Black African
- Mixed/multiple ethnic group: White and Asian
- Mixed/multiple ethnic group: Other Mixed
- Asian/Asian British: Indian.....
- Asian/Asian British: Pakistani
- Asian/Asian British: Bangladeshi
- Asian/Asian British: Chinese.....
- Asian/Asian British: Other Asian
- Black/African/Caribbean/Black British: African
- Black/African/Caribbean/Black British: Caribbean
- Black/African/Caribbean/Black British: Other Black
- Latin American/Hispanic.....
- Arab.....
- Refused
- Other.....

Other - please specify

Q30 What is your religion? *Tick one box only*

No religion.....	<input type="checkbox"/>
Buddhism.....	<input type="checkbox"/>
Christianity.....	<input type="checkbox"/>
Hinduism.....	<input type="checkbox"/>
Islam.....	<input type="checkbox"/>
Judaism.....	<input type="checkbox"/>
Sikhism.....	<input type="checkbox"/>
Rastafarianism.....	<input type="checkbox"/>
Prefer not to say.....	<input type="checkbox"/>
Other.....	<input type="checkbox"/>
Other - please specify	<input type="text"/>

PLEASE READ OUT:

Thank you for taking the time to answer these questions. Are you willing to provide some contact details to allow us to complete quality checks on interviewers?

Q31 Did the respondent agree to provide details?

Yes.....	<input type="checkbox"/>
No.....	<input type="checkbox"/>

Q32 Please enter Name

Q33 Please enter phone number

APPENDIX B: LETTER OF AUTHORITY

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11 July 2017

To whom it may concern

Elephant and Castle shopping centre usage survey

This survey is being conducted by independent market Research agency AECOM who have been commissioned by Southwark Council to complete an Equalities Analysis to help them better understand use of the Palace Bowling operation in the Elephant and Castle shopping centre. The survey follows on from previous survey work at the shopping centre carried out in 2016 and a survey of the bingo hall in early 2017. The survey has been designed to develop a more detailed understanding of the usage of the bowling alley. The survey is part of the standard consultation process undertaken with any community affected by a large development proposal.

The research is being carried out by **AECOM**, an independent research consultancy on behalf of Southwark Council.

This is genuine research that is being conducted under the Market Research Society's (MRS) Code of Conduct – you can check AECOM's MRS membership by visiting https://www.mrs.org.uk/company_partner/company_partner_members/full_a-z_listing and <http://www.theresearchbuyersguide.com/freephone/alpha/A>

Your answers will be treated in strict confidence in accordance with the Data Protection Act. They are used for statistical research purposes only. Names and addresses are never included with the results.

If you have any questions please call Katie Jackson at AECOM on 0121 262 6778. If you wish to speak to someone at Southwark Council about this research, please call me on 020 7525 5450 or Jon Abbott 020 7525 4902

Thank you for your help.

Yours faithfully

Dan Taylor
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