



Understanding Visiting & Shopping in East Street Market

November 2013

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Research Objectives

Key objectives:

Understand the habits and spending patterns of East Street Market's visitors and the views of visitors and adjacent shopkeepers concerning a potential change to the trading days of the market

Research objectives in more detail:

- *Establish how current visitors use East Street Market for shopping, their usual visiting pattern, how much and where they're spending, and how they would react to a change in the operation of the market*
- *How a change of opening pattern would affect the flow and numbers of visitors to East Street Market*
- *Assess how neighbouring shopkeepers perceive the market, its importance to their businesses, and how a change of opening pattern might impact their trade*
- *Verify numbers visiting the Market and relativities by day of week, and by trading session*



Research Approach - Survey of visitors

We delivered three linked pieces of research

Questionnaire based quantitative survey of visitors/shoppers encountered within the boundaries of the market

Face-to-face on-street interviews, using a 'next available' approach without quota

In spite of mixed weather we achieved a harvest of 431 completed interviews, exceeding the target of 350

Interviewing across 3 days Wednesday, Saturday and Sunday over 2 consecutive weeks (w/c October 28th and w/c November 4

Interviewing window : 9am to 4.30pm

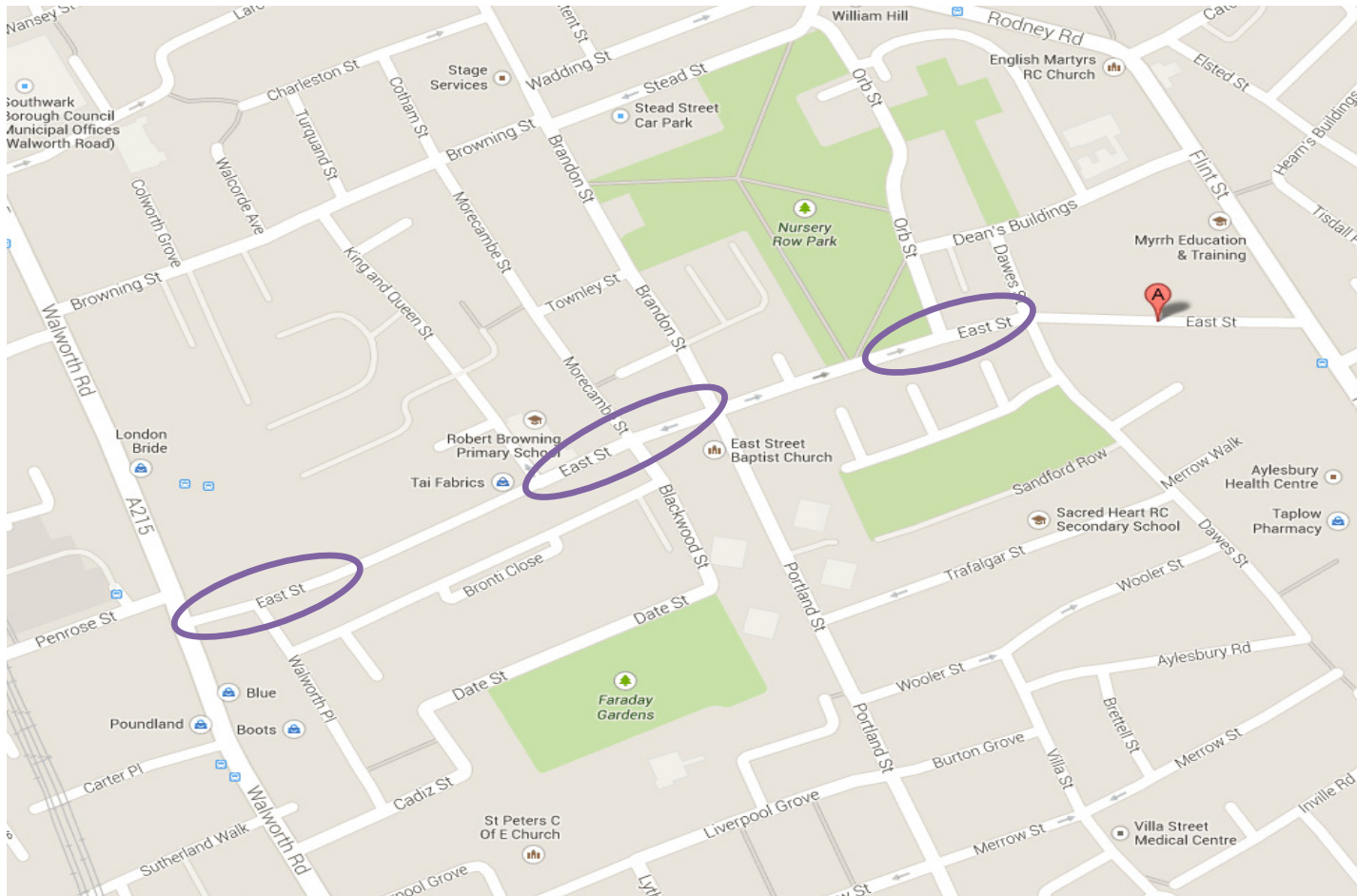
Wednesdays and Saturdays; 10am to 3pm Sundays

	Interviews targeted	Interviews achieved
Wednesdays	100	135
Saturdays	150	175
Sundays	100	124



Survey of Visitors : interviewing locations

To ensure sampling of views right across the long street market, we conducted intercept interviews at three locations. On Sundays we worked only the two easterly locations



Research Approach – Interviews with shopkeepers

We were also briefed to interview owners and managers of shops and cafes located along East Street to build understanding of how they regard the market, and its importance to their trade and customer base. For this module we used the technique of Depth Interviews to draw out issues of perception and rationale using a lightly facilitated 1:1 interview session with a number of pre-agreed prompts, lasting about 10 minutes



Shopkeepers / cafe managers interviewed

We were able to complete interviews with 22 shopkeepers/cafe managers situated on East Street, covering a good spectrum of businesses by type of trade and by size. Language and understanding were a challenge in a number of cases, and about a quarter of shopkeepers were unwilling to be interviewed, claiming most usually that the exercise would not be acted on

Recruiting for interviews

To provide the widest opportunity for all stakeholders to have their say we left the card shown here in all businesses on East Street and also called at least twice on all premises, offering the chance of an interview there and then, or at an arranged time. Some managers were unwilling to give an interview without the permission of the (absent) owner. Depth Interviews took place from Wed October 30th to Sunday November 10th



**East Street Shopkeepers:
Share your views about East Street Market**

Southwark Council Markets has appointed independent research company ROI Team to interview visitors and shoppers about their views and opinions of East Street Market. You will see our interviewers at work along the market on Wednesdays, Saturdays, and Sundays starting from October 30th

We also want to interview owners and managers of shops along East Street to understand how you regard the market, the type of people it brings into East Street, and the importance of the market to your trade

ROI Team interviewers will be working in East Street Market from October 30th until November 10th and we will welcome the chance to 'Depth Interview' you in your shop. Depth Interviews are a lightly facilitated one-on-one discussion around a subject lasting about 10 minutes, with the interviewer making a note of the views you express to play back to our client, Southwark Markets

Our Supervisor will contact you to arrange a convenient time to interview you and we will appreciate if you can spare 10 minutes to share your views and opinions which will help us to improve the area and the market. Alternatively, to arrange an interview, please call 07772 352804 and let us know your name, the name of your shop, and the timing most convenient for you

ROI are experienced at working in retail locations, and you can expect our interviewers to act with courtesy and sensitivity towards yourself, your staff, and your customers

Southwark
Council

ROI team

Topics Guide

Depth Interviews are essentially a lightly facilitated discussion, using a pre-agreed Topics Guide

East Street Market Southwark Depth Interview note

SHOPKEEPER

Name (interviewee) and store:

Male/female

Approx age

Home postcode

Contact Details

1 How do you describe your offering?
How long has your store been trading on East Street?

2 What are your usual opening hours?
Which days (or half days) do you close?

3 Would you welcome later opening hours for the market?
If the market was open til later, would you also open later?
Which would be the best days for later closing?
How would this change the type of people who come to East Street?

4 How important is the market for your business?
What proportion of your customers do you believe also shop in the Market?
Roughly what % of your turnover do you attribute to market shoppers?
Does your trade suffer as a result of the Market being closed on Mondays

5 At the moment East Street Market trades 6 days per week, Tuesday to Sunday. Is this a good pattern?
How would the Market closing another day affect your business?
If the market was to close on another day, which would be best for you?
How far are your customers tied to a particular day of the week?

6 Do you have any other suggestions/comments to improve the area?
[Continue over page if necessary]

Research Approach – Footfall Counting

This module provides objective knowledge of the relative importance of all 6 days trading, detailed flow of visitors through the day, and the relative density of footfall along the 'market street'

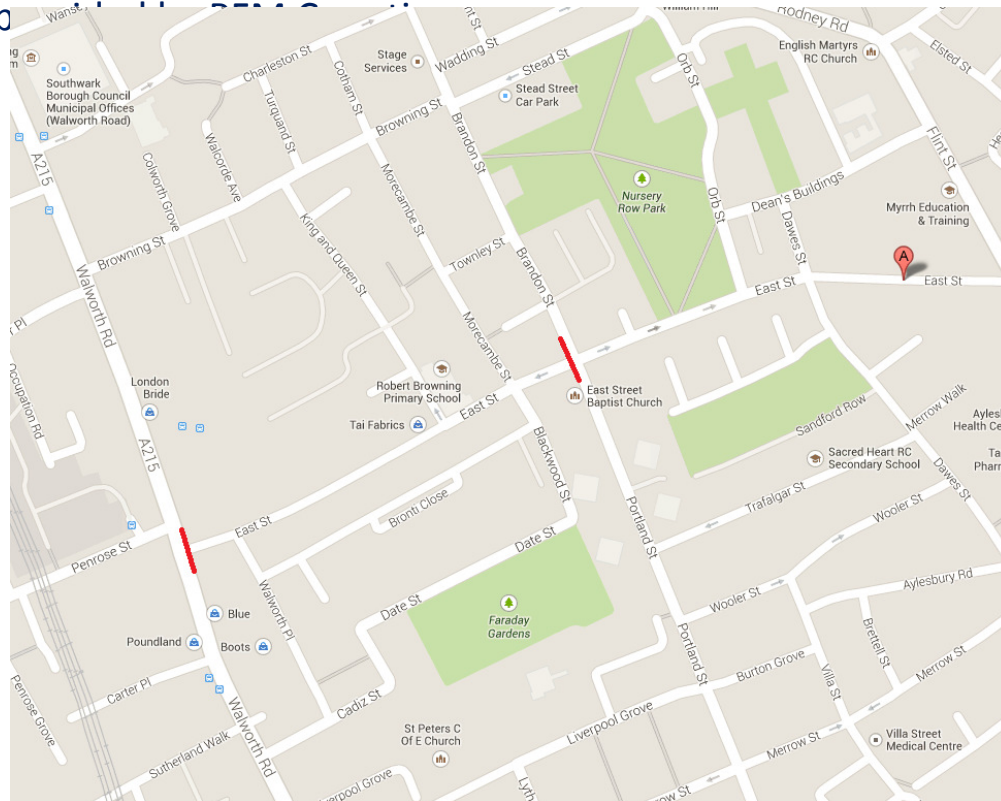
This information is the starting point to consideration of possible changes to opening patterns and rental potential

Research objectives in more detail:

- *Verify numbers visiting the street and market, and relativities by day of week, and by trading session*
- *How a change of opening pattern would affect the flow and numbers of visitors to East Street Market*

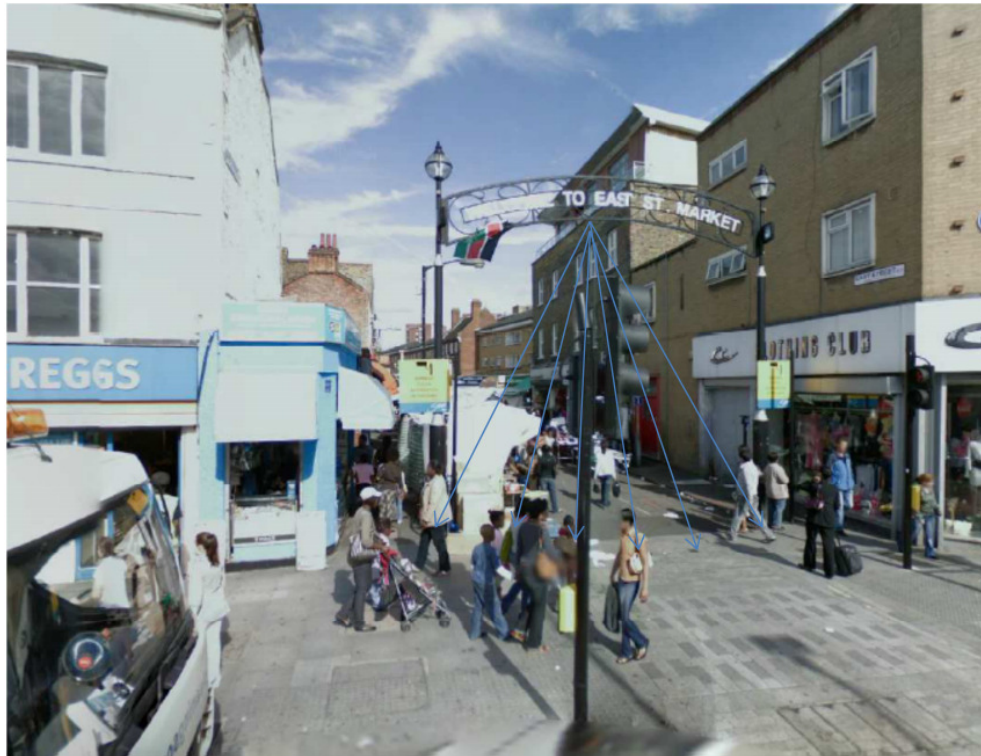
Research Approach – Counting people movement

- Installation of automated electronic counting system at main entrance to East Street across three full trading weeks in November 2013
- Manual counting based on video coverage at the crossing of East Street and Portland Street
- The system gathered data on visitor numbers by date and time, and by point of entry
- Automated Electronic counting system for period of 3 weeks (w/c November 4th, 11th, and 24th across 24 hour day)
- Manual Counting for 2 trading days (Wednesday Nov 6th and Sunday Nov 10th)
- Counting equipment and system p...



Footfall Counting
Locations

Counting Locations



Electronic sensor installed at the Walworth Road entrance, supporting round the clock counting with real time readout. Sensor counts only the roadway, not the pavements

Video camera installed at the crossing of East Street and Portland Street, supporting manual counting during market opening hours on Wed 6th and Sunday 10th November



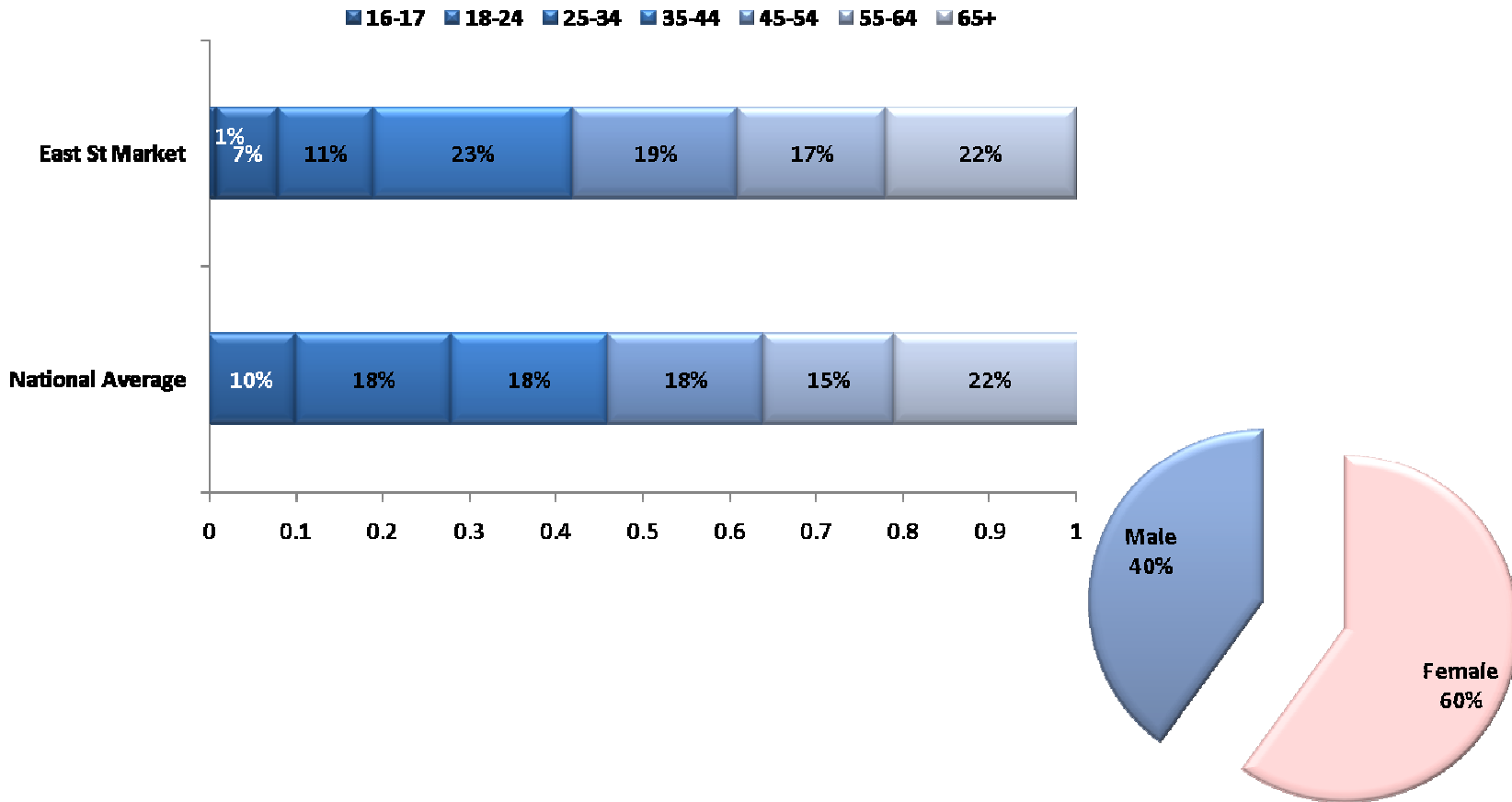
Survey of Visitors



Profile of visitors to East Street

Age and Gender

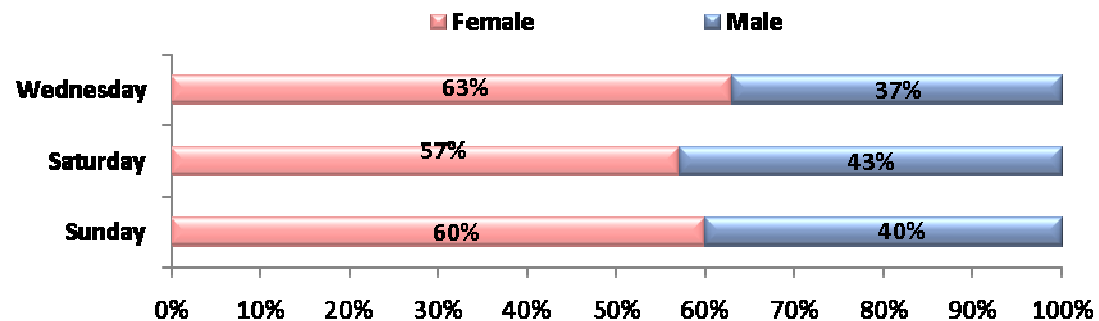
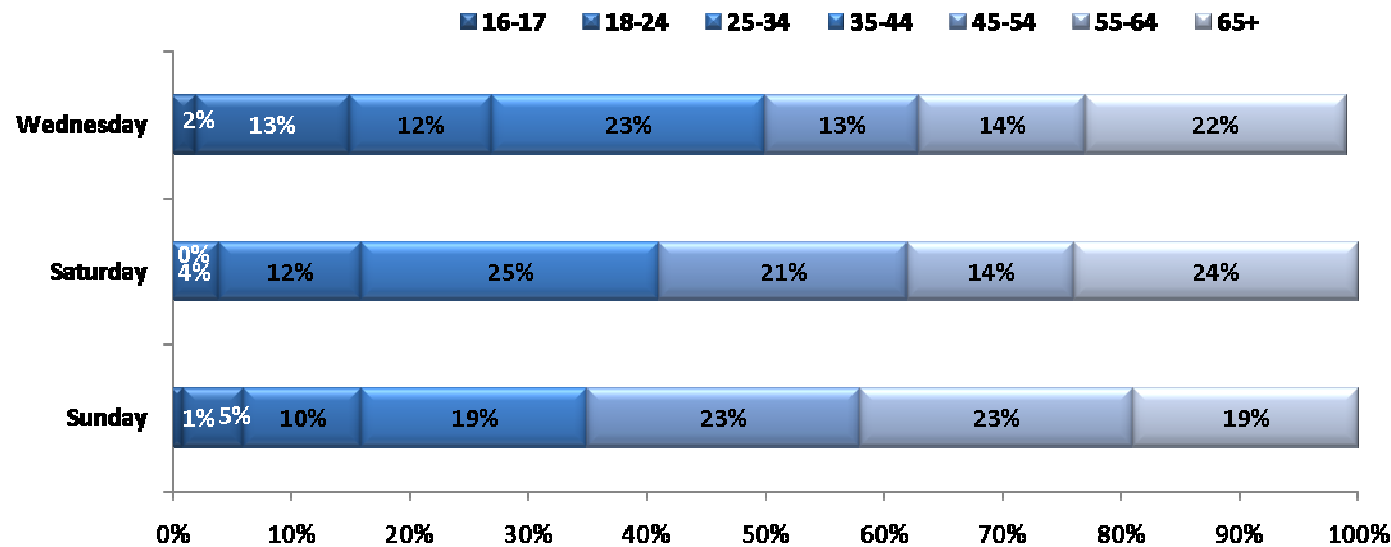
East Street is much favoured by mid-age shoppers aged 35 to 44 y/o, but is shunned by the younger 25 to 34 shoppers. Men make up 4 in every 10 shoppers, quite a bit higher than we would find in a shopping centre or High Street



Q15. Which age group do you fall into? Gender?
Base: 431

Age and Gender by day

Young shoppers go elsewhere at weekends : on Saturdays only 4% of visitors are aged under 25 and on Sundays only 6% (compared with 15% on Wednesdays). This means the weekends are dominated by older visitors. On Saturdays 59% are aged over 45, and on Sundays 65%



Q15. Which age group do you fall into? Gender?
Base: 431

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.

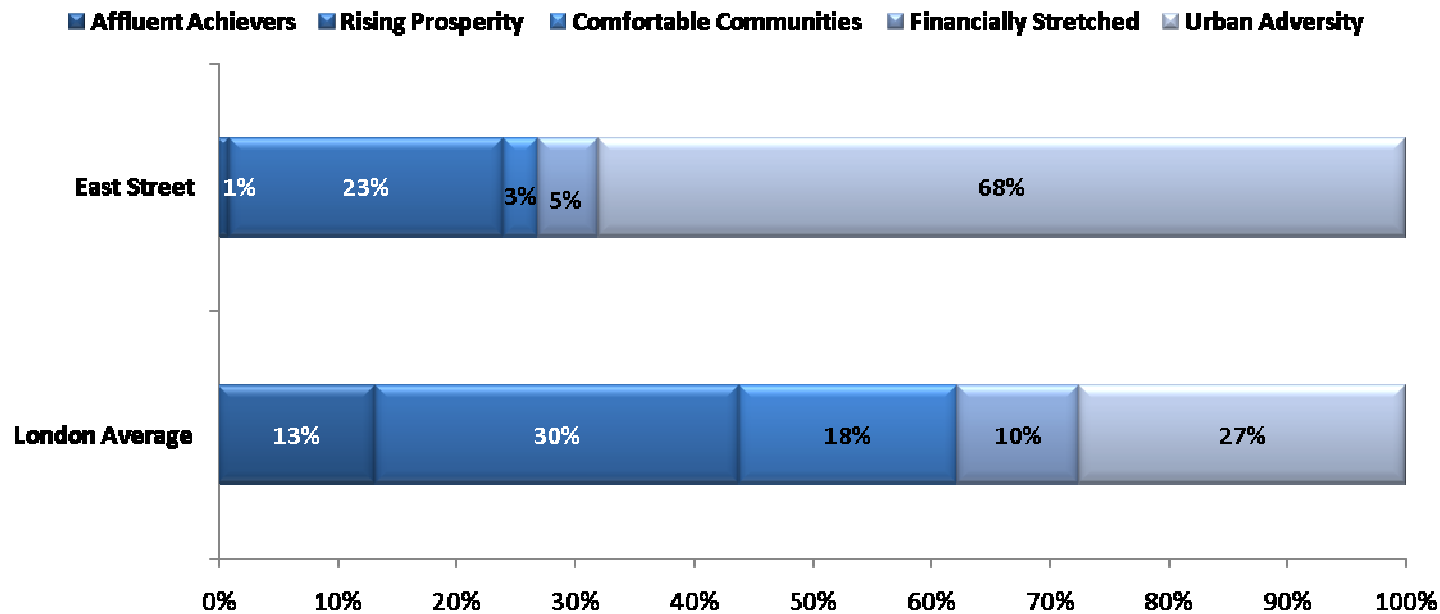
It provides detailed understanding of the consumer and lifestyle characteristics of people and places across the UK. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people.

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%

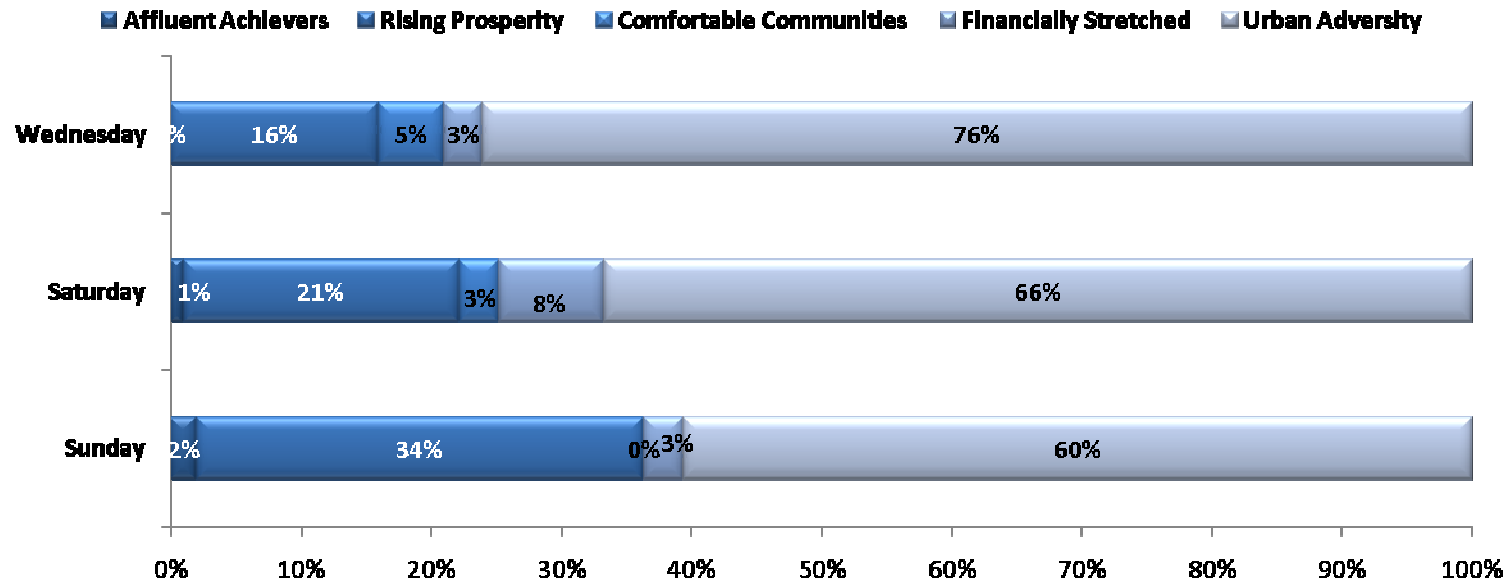
Lifestyle profile

East Street has an overwhelming presence of ACORN's most challenged lifestyle types, 'Urban Adversity'; that said, at the other end of the scale, a quarter of East Street visitors are from the free-spending 'Rising Prosperity' type, consisting of younger career professionals



Sunday Market attracts a more affluent profile

The different offer of the Sunday market is attracting a healthy proportion of professional people, with more than a third coming from ACORN's second most affluent type *Rising Prosperity* – double the proportion found on Wednesdays



Q17. What is your postcode?
Base: 431

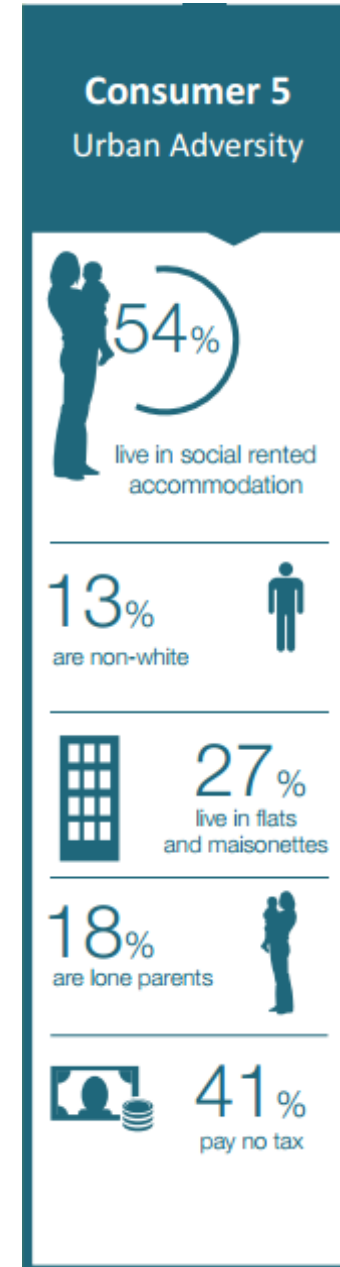
Urban Adversity: 68% of East Street Market Visitors



Sub-groups in this category:

Struggling Estates	66.25%
Difficult Circumstances	1.58%

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



Rising Prosperity: 23% of East Street Market Visitors



Sub-groups in this category:

City Sophisticates	12.5%
Career Climbers	10.5%

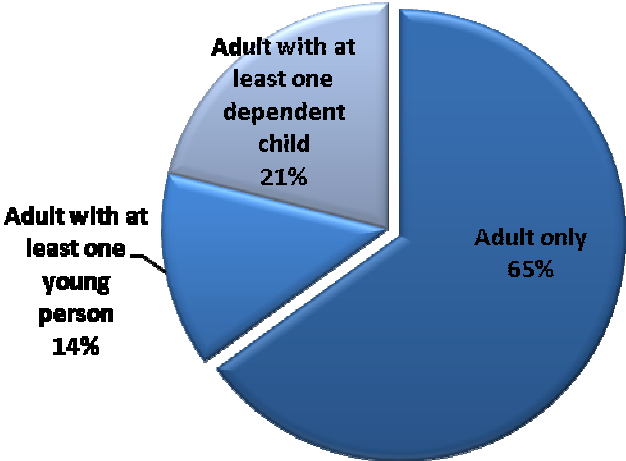
These are generally younger, well educated and mostly prosperous people living in our major towns and cities. These people have a cosmopolitan outlook and enjoy their urban lifestyle. They like to eat out in restaurants, go to the theatre and cinema and make the most of the culture and nightlife of the big city



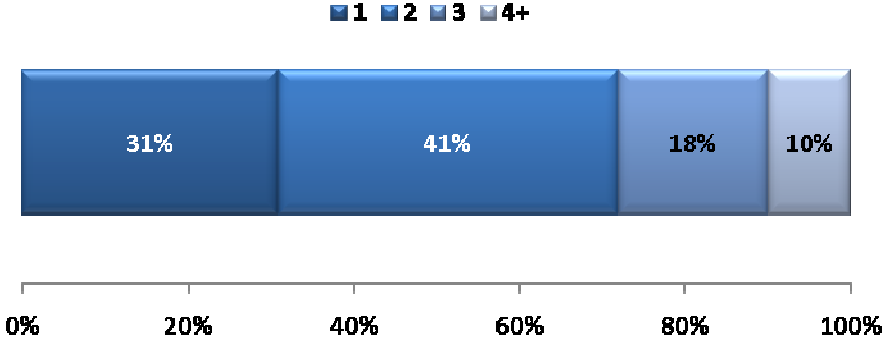
Household Composition

True to their lifestyle status, more than a third of East Street shopper households include dependent children. One third of your shoppers are single adult households

Type of Household



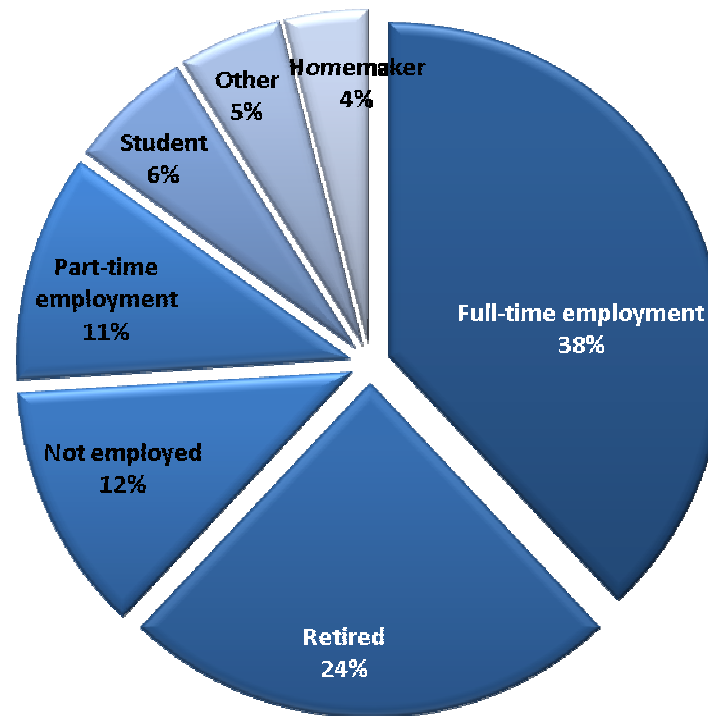
Number of Adults in Households



Q14. How many people live in your home?
Base: 431

Employment Status

Almost half of East Street visitors are working either full or part-time, with very nearly a quarter of visitors retired. Given the proximity of a big campus and numerous student halls, it's surprising that only 6% of visitors are students. This may represent an opportunity to recruit new shoppers



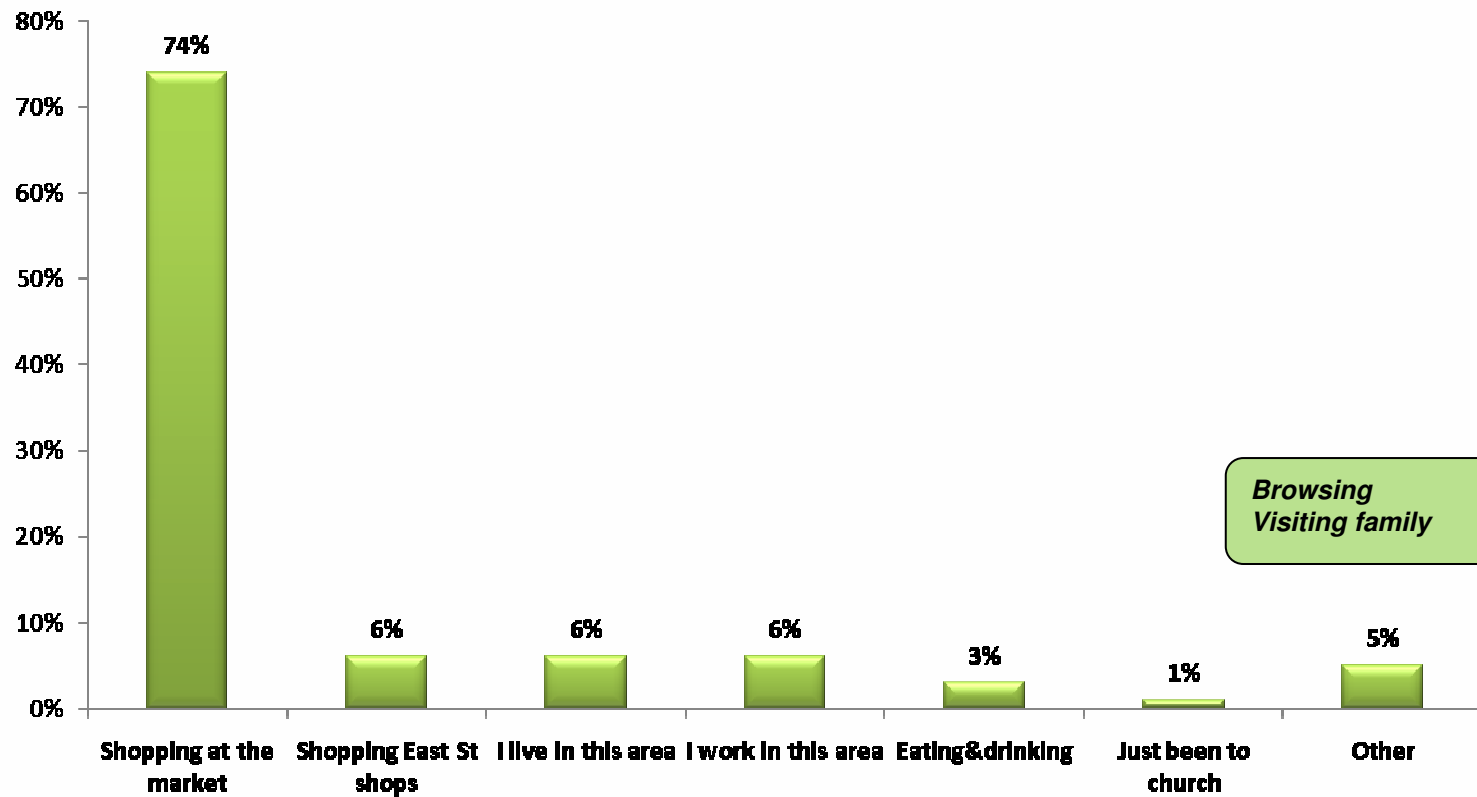
Q16. What is your employment status?

Base:431

Visitor Choices

Main purpose for visit

Almost three quarters of visitors found on East Street are there to shop the market. East Street shops have a very limited appeal and the eating/drinking offer is not seen as a draw

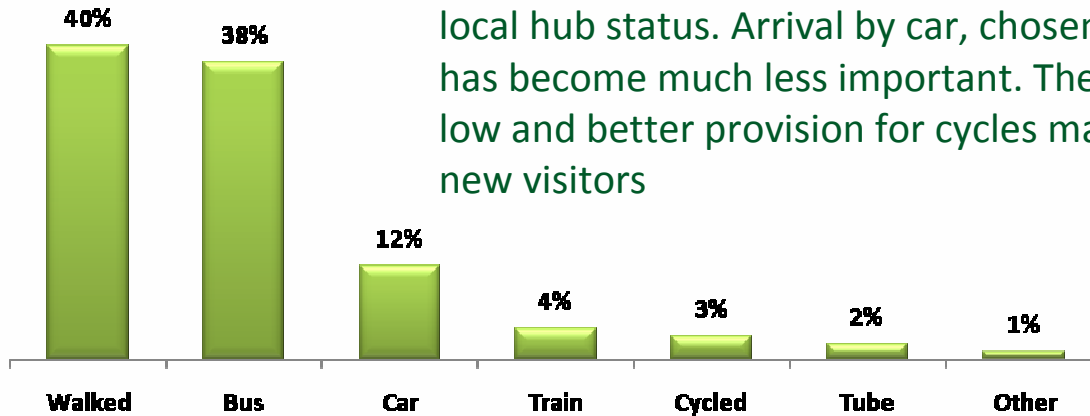


Q1. What is the main purpose of your being here today? (single answer)

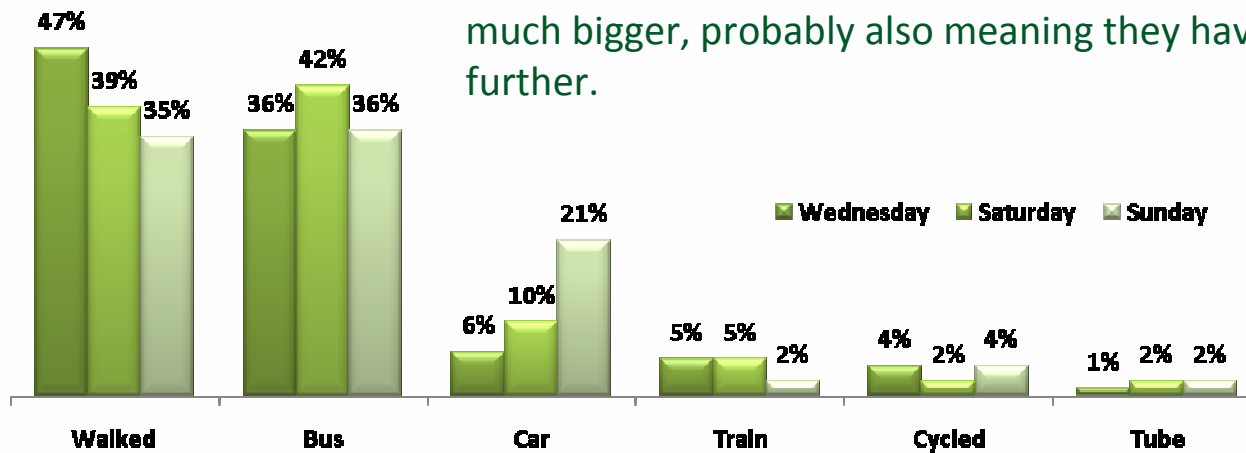
Base: 431

Means of arrival

Most visitors choose to walk to East Street Market, reflecting its local hub status. Arrival by car, chosen by only one in 8 visitors, has become much less important. The % arriving by bike is very low and better provision for cycles may present a way to recruit new visitors



With free parking on Sundays, the proportion arriving by car is much bigger, probably also meaning they have travelled further.

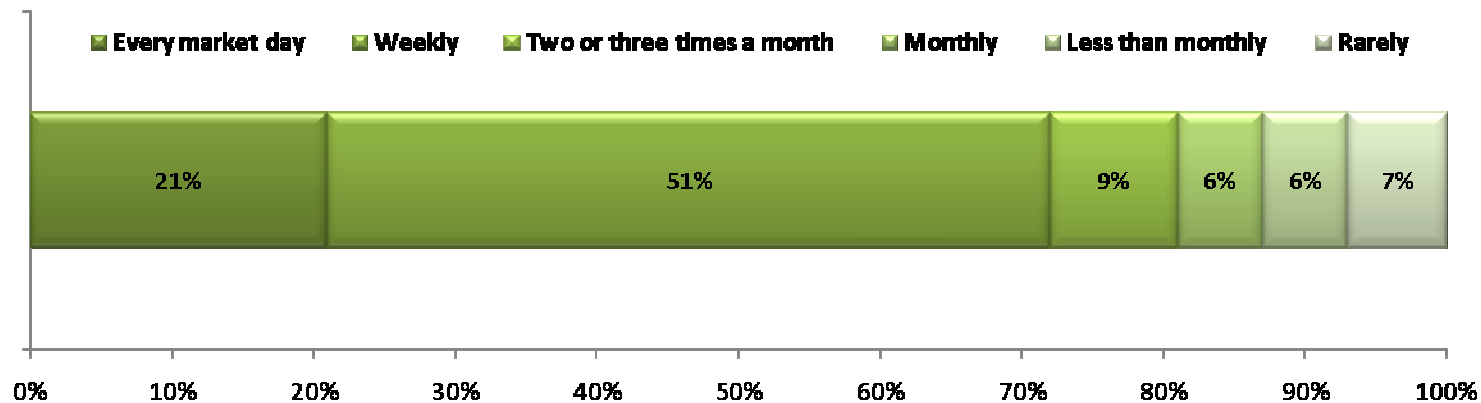


Q8. How did you travel here today?

Base: 431

Frequency of visit

Shopping East Street Market quickly becomes a habit, with 1 in 5 saying they visit every market day, and half coming on a weekly basis. From here it's hard to see how to increase frequency of visit – so growth has to come from attracting new visitors and encouraging higher spend from the existing base



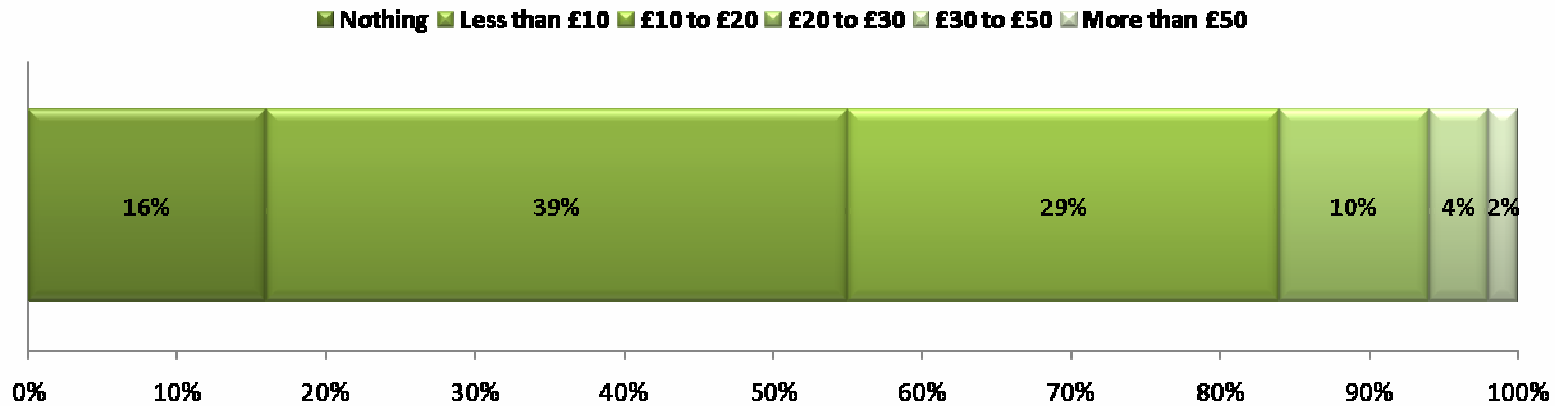
	Ave Freq of visit per week
East St. Market	2.28

Q3. How often do you visit this market? (single answer)

Base: 431

Spending at market stalls

Only 1 visitor in 6 leaves East Street without buying anything. Although average spend per trip may be low, the monthly spend of spending customers is a respectable £138 per month, in line with many value shopping centres. The challenge is to get the half currently spending less than £10 on their trip to boost their spend.



	Spending Visits Only	All Shoppers Including non spenders	Aggregate Monthly Spend (Spenders)
East Street Market	£14	£12	£138

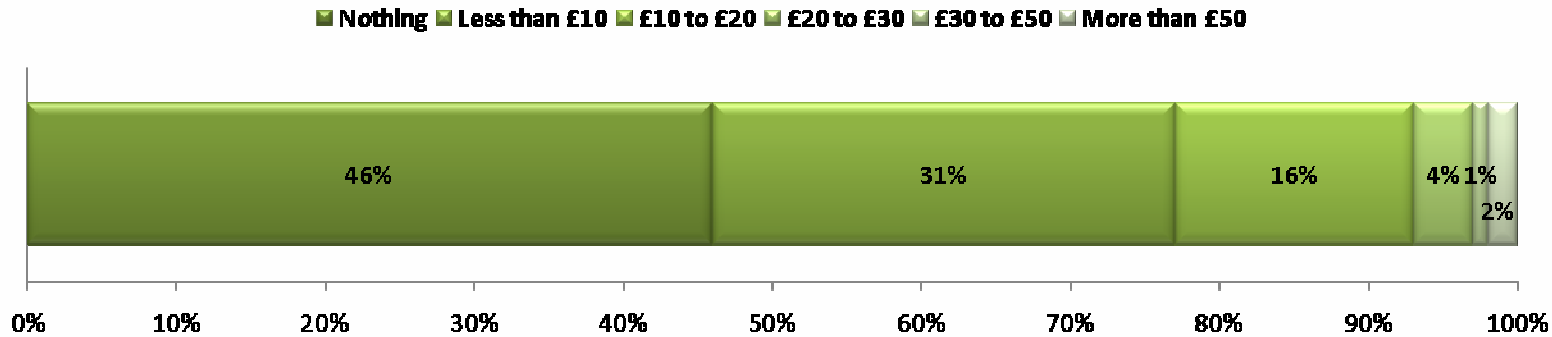
Q5. How much do you expect to spend at market stalls in this market today?

Base: 431

Aggregate Monthly Spend figures are based on a projection i.e. Average spend per visit (spending visits only) x average frequency of visit x 52 ÷ 12

Spending in shops

We can see the performance of East Street shops is much weaker, with nearly half of visitors avoiding them entirely. The proportion spending more than £10 in East Street shops is less than a quarter. That said our interviewers encountered shoppers who had travelled long distances and were spending more than £200 in East Street shops



	Spending Visits Only	All Shoppers Including non spenders	Aggregate Monthly Spend (Spenders)
East Street Shops	£12	£7	£119

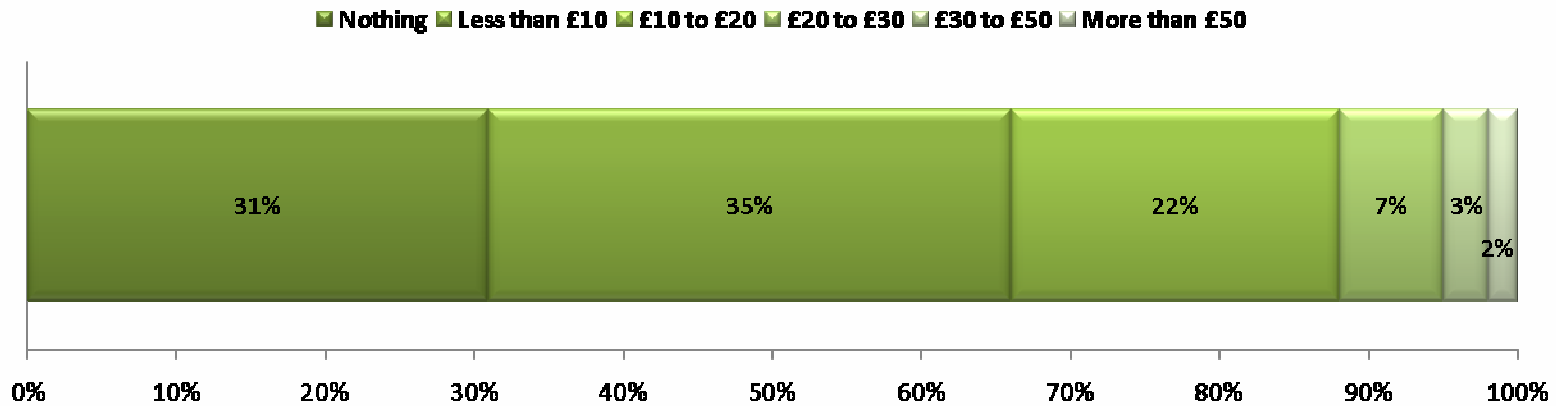
Q7. How much do you expect to spend in East Street shops today?

Base: 431

Aggregate Monthly Spend figures are based on a projection i.e. Average spend per visit (spending visits only) x average frequency of visit x 52 ÷ 12

Spending in total

Adding together spend in the market with spend in shops doesn't increase the average by much. It appears that there isn't much cross-over between stalls and shops, with most visitors spending in one or the other. And disappointingly, two thirds are spending nothing or less than a tenner



	Spending Visits Only	All Shoppers Including non spenders	Aggregate Monthly Spend (Spenders)
East Street	£13	£9	£128

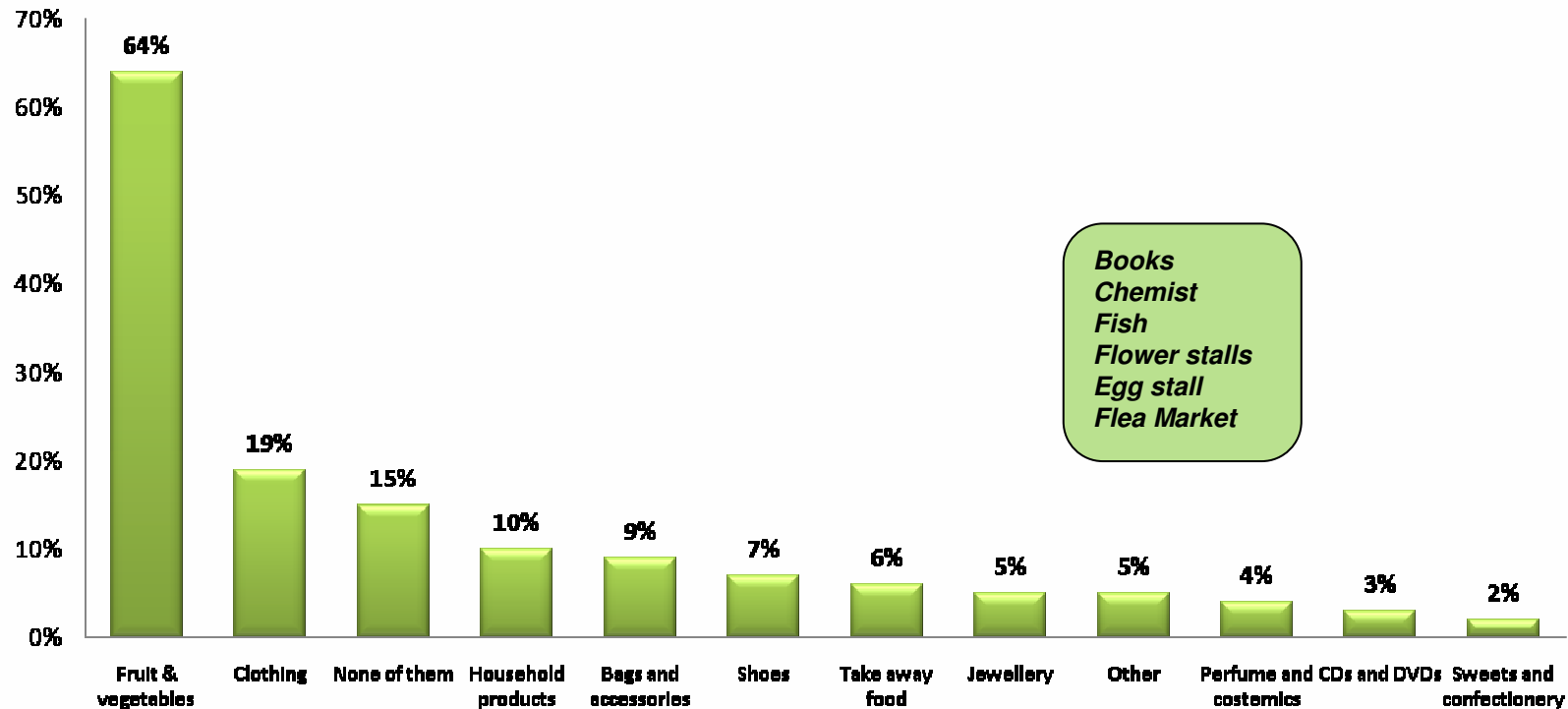
Q7. How much do you expect to spend in East Street today?

Base: 431

Aggregate Monthly Spend figures are based on a projection i.e. Average spend per visit (spending visits only) x average frequency of visit x 52 ÷ 12

Which market stalls do they visit?

Fruit & Veg is by far the biggest draw for East Street Market. Two thirds of all visitors make for a fruit & veg stall, equal to the % visiting all the other stalls put together. Only 1 visitor in every 7 is by-passing all the stalls

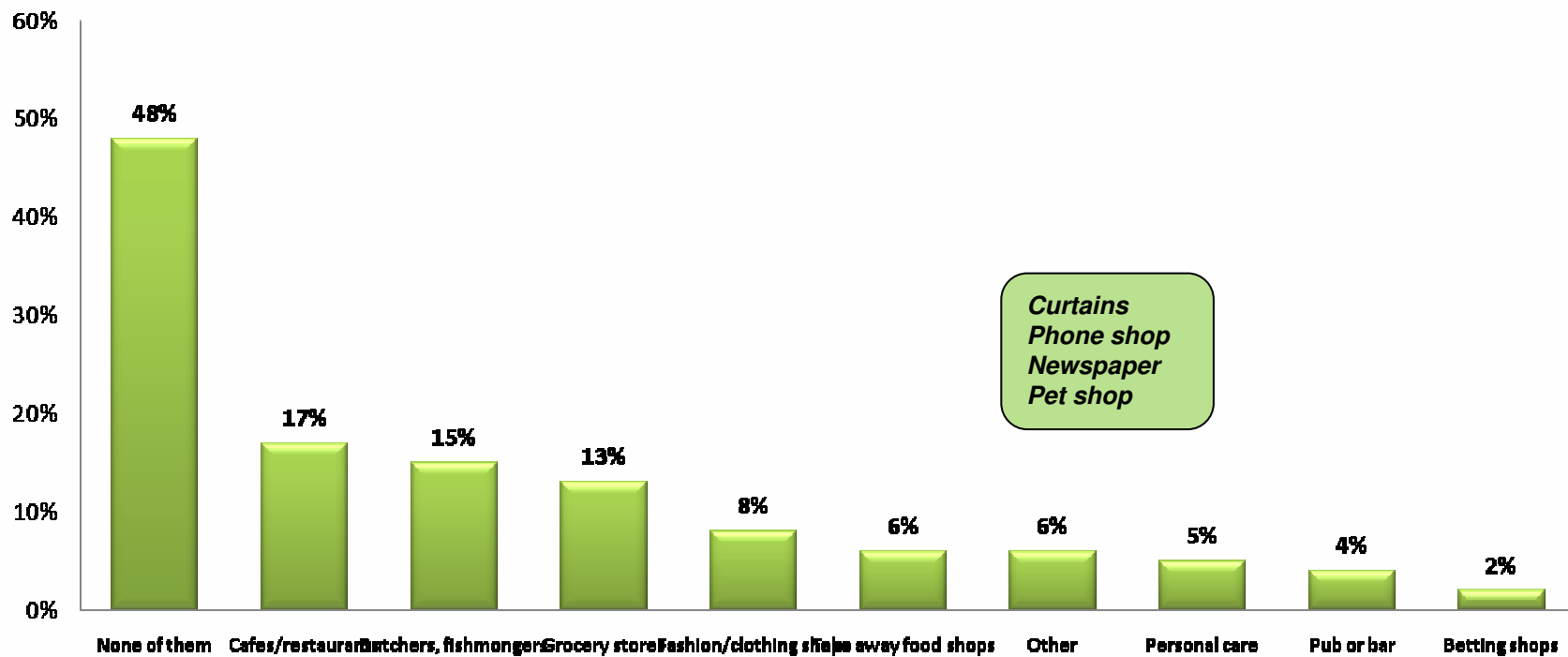


Q4. During your visit today, which market stalls have you visited or do you intend to visit? (multiple answers)

Base: 431

Which shops do they visit?

Slightly more than half of visitors are by-passing all the shops on East Street. No category is visited by more than one fifth of visitors, with cafes, butchers/fishmongers, and grocery stores all favoured more or less equally. The myth of ‘benefits scroungers’ frittering what little money they have is dispelled : less than 6% of East Street visitors enter either a betting shop or a pub

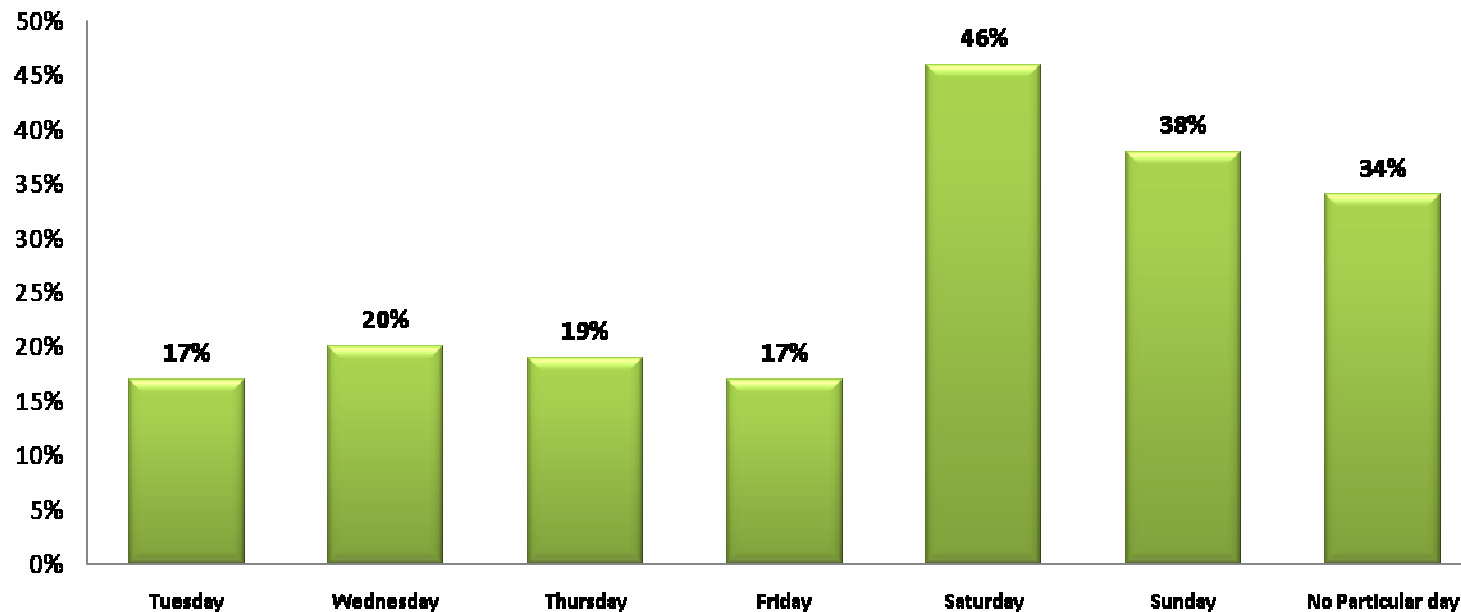


Q6. During your visit today, which East Street shops have you visited or do you intend to visit? (multiple answers)

Base: 431

Preferred day for visiting

Saturday and Sunday are the 'appointment days' for visiting; Sunday then is especially important, as other evidence suggests it is attracting 'unique visitors'. All other days have about the same level of favour. And as many as a third of visitors have no clear pattern, coming to the market to suit themselves

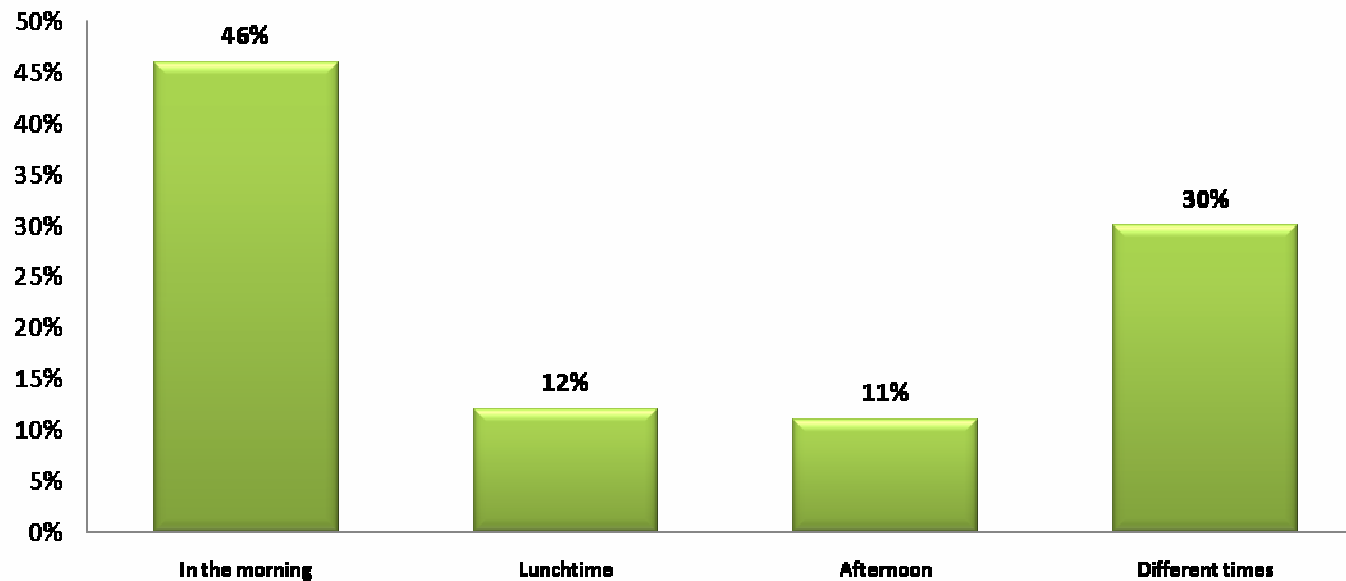


Q9. When do you usually visit this market to shop? (select as many as apply)

Base: 431

Preferred time of day for visiting the market

East Street visitors say they prefer to come in the morning, with almost half selecting the morning as their favoured timing. Almost a third have no preferred timing, coming at whatever time suits on the day

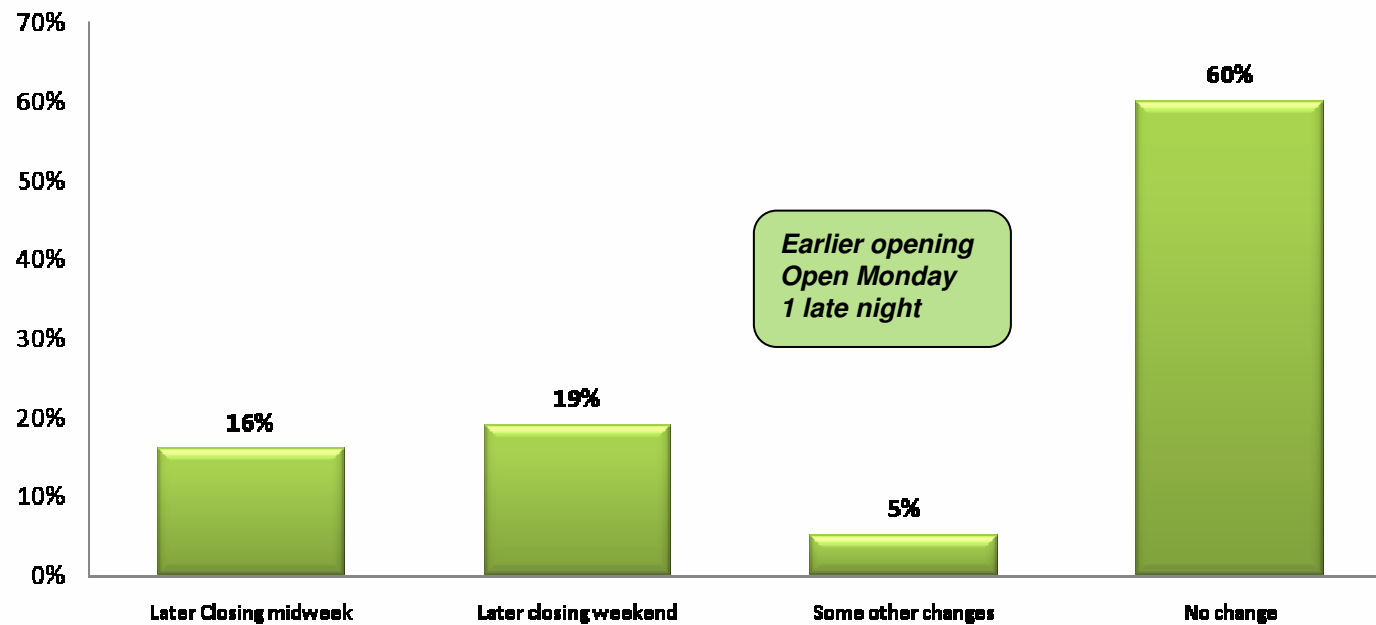


Q9. When do you usually visit this market to shop? (select as many as apply)

Base: 431

Opening Hours

The majority of visitors are happy with the current opening hours of East Street Market. That said 1 in 5 would welcome later closing on Friday or Saturday, with 1 in 6 wanting later closing during midweek



Q12. What would be your preferred opening hours?

Base: 431

Perceptions and wishes of East Street visitors

What visitors like about East Street Market

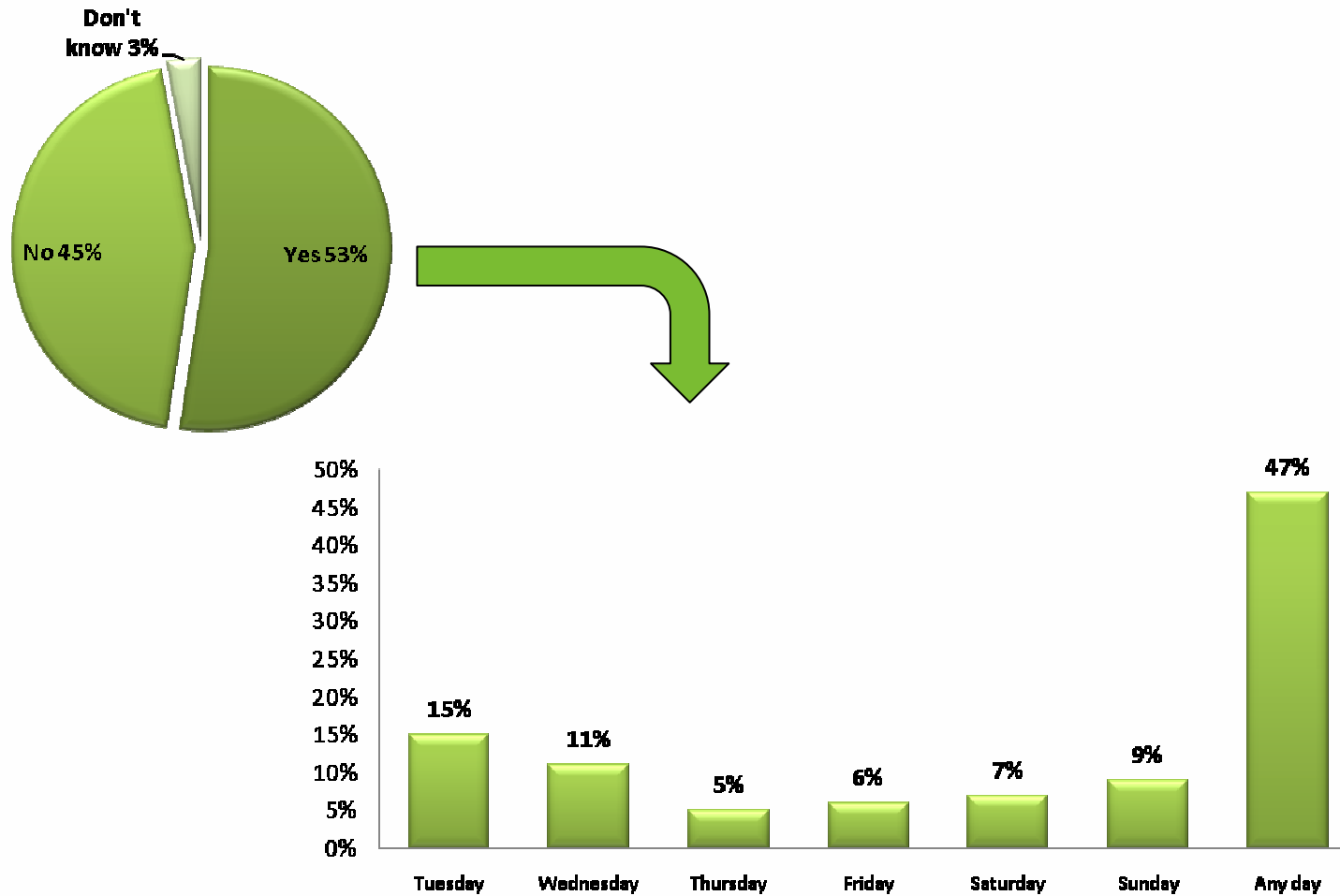
Fresh produce, especially fruit & veg and meat/fish, are what visitors most like about East Street. All types of shop are relatively unloved; and hardly anybody has a good word to say about the eating/drinking places



Q2. What do you especially like in East Street Market? (max. 2 answers)
Base: 431

Alternative market visiting day

Any additional closing of the market would be a risk, with almost half of market visitors saying they would not be able to come on another day

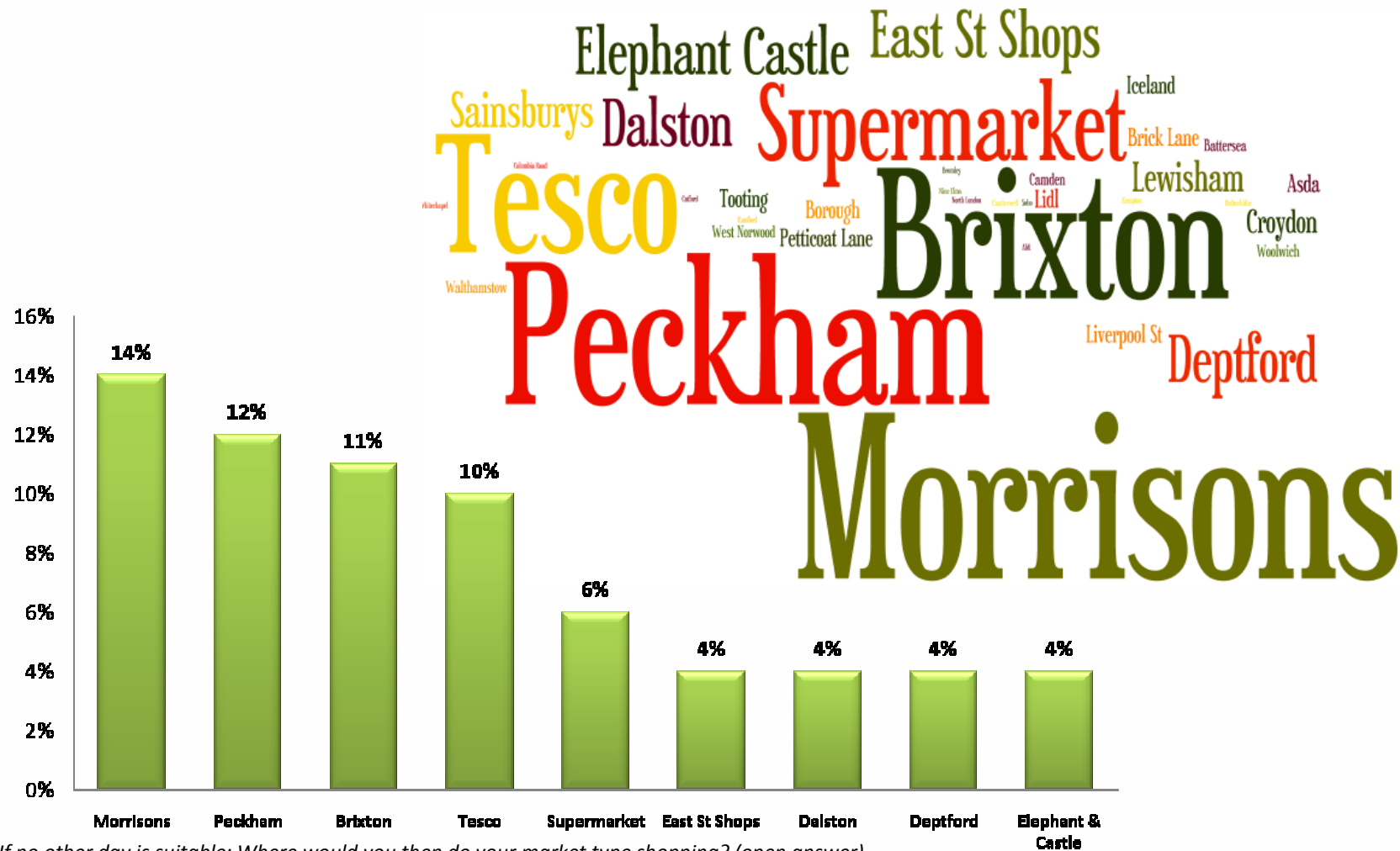


Q10. If the market was closed when you usually visit, could you come on any other trading day?

Base: 431

Where would they go?

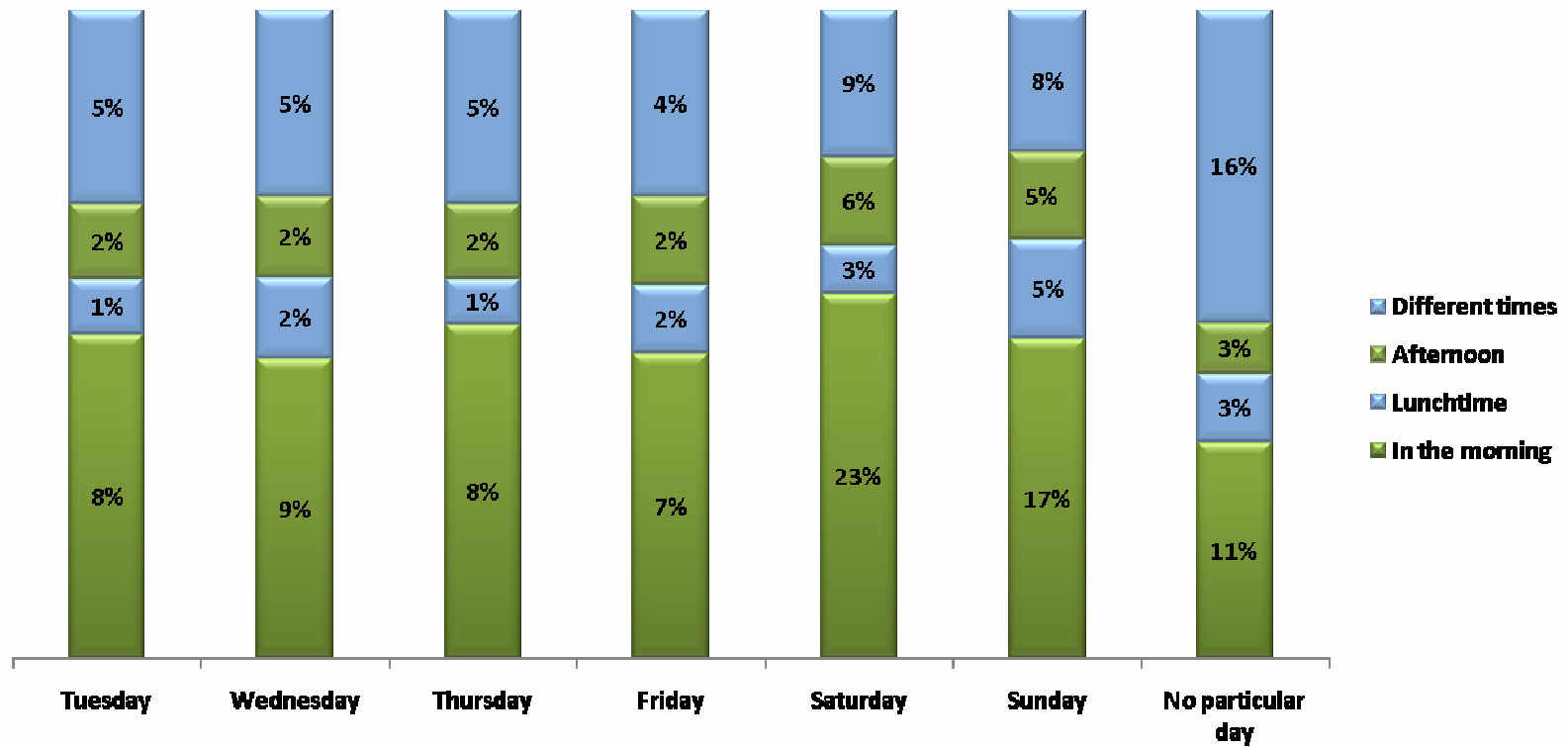
East Street visitors are aware of various other locations where they could replace their market-type shopping, headed by Morrisons, Peckham, and Brixton Market. It appears East Street shops would not benefit from a market closure



Q10. If no other day is suitable: Where would you then do your market type shopping? (open answer)

Base: 194

Preferred time of day for visiting the market

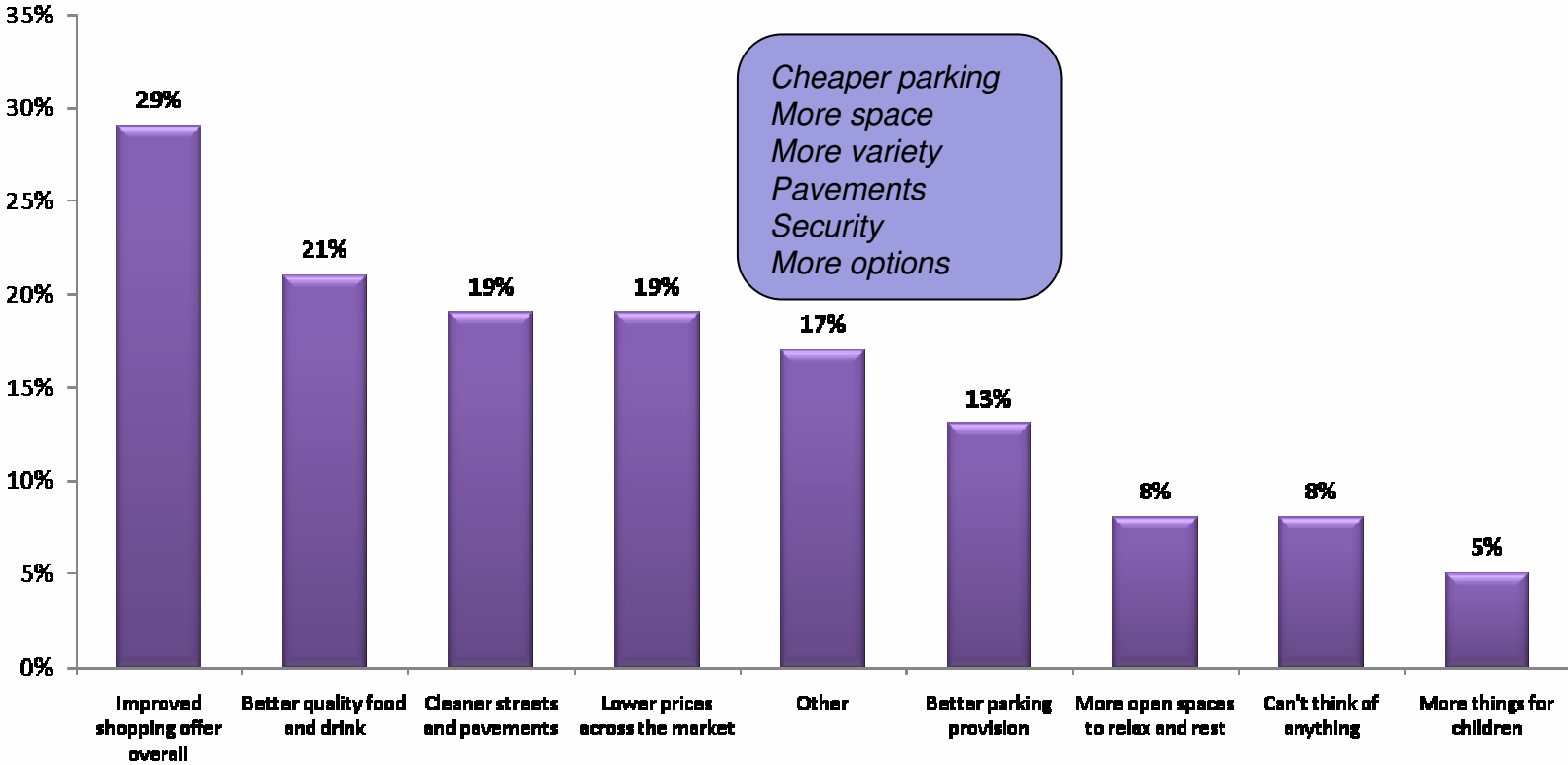


Q9. When do you usually visit this market to shop? (select as many as apply)

Base: 431

What would make you visit more often?

More than 9 out of every 10 visitors has ideas for improving East Street. More than a quarter of visitors would be swayed by a better overall shopping offer; whilst about 1 in 5 would be swayed by better food & drink; cleaner streets; and lower prices



Q13. Which of the following things would persuade you to come more often to this market? (max. 2 answers)

Base: 431



Comments and suggestions for East Street ...

- 'Very good market, like meeting and chatting to people everyday'*
- 'Some traders are rude, bad customer service'*
- 'Not same market as it used to be'*
- 'Start again, fashion clothes, normal fruit & veg. Quality products, proper butchers'*
- 'Lack of pricing on fruit & veg, weights and measure dubious'*
- 'Nice and friendly'*
- 'Need decent stalls, local bakers. Used to be more local. Get some British things, British butchers'*
- 'More varied stalls, vintage stalls, crafts'*
- 'Cover better health and safety'*
- 'Price is good for fruit and veg. If they improve the quality on fruit and vegetables they would double customers'*
- 'Not as good as before'*
- 'Park for kids. Improve it'*
- 'Keep locations of stalls same. Don't keep moving them'*
- 'Improvement in cleanliness, more stalls'*
- 'More English butchers'*

Q. Other comments?

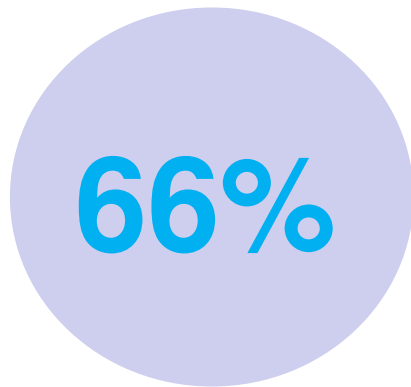
Base: 431

Impact of the market on spending in East Street shops

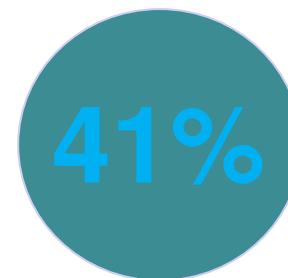
Across the board, shopkeepers participating in our interviews believe about two thirds of their customers also shop in the market. But shopkeepers believe they are less dependent on the market than might be supposed, estimating about £4 in every £10 is spent by market shoppers – and this average represents a claimed range from 0% to 100% !

Some shops say that market shoppers are their only customers; whilst for some the proportion is very low.

It will be recalled that other data indicates lower cross-over levels



*of customers of East Street shops
also shop in the market*



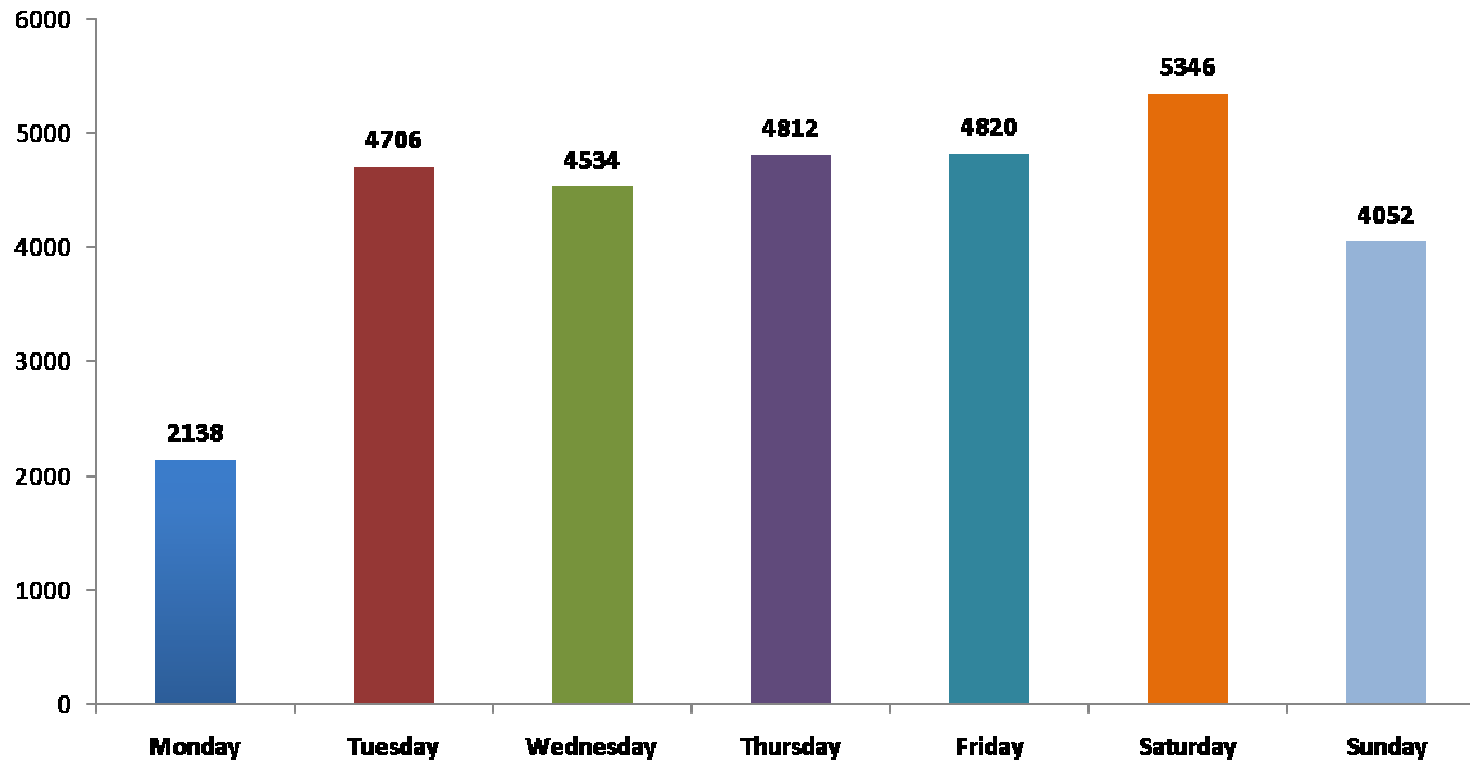
*of shops' turnover comes from
market shoppers*



People movement on East Street

Footfall by day

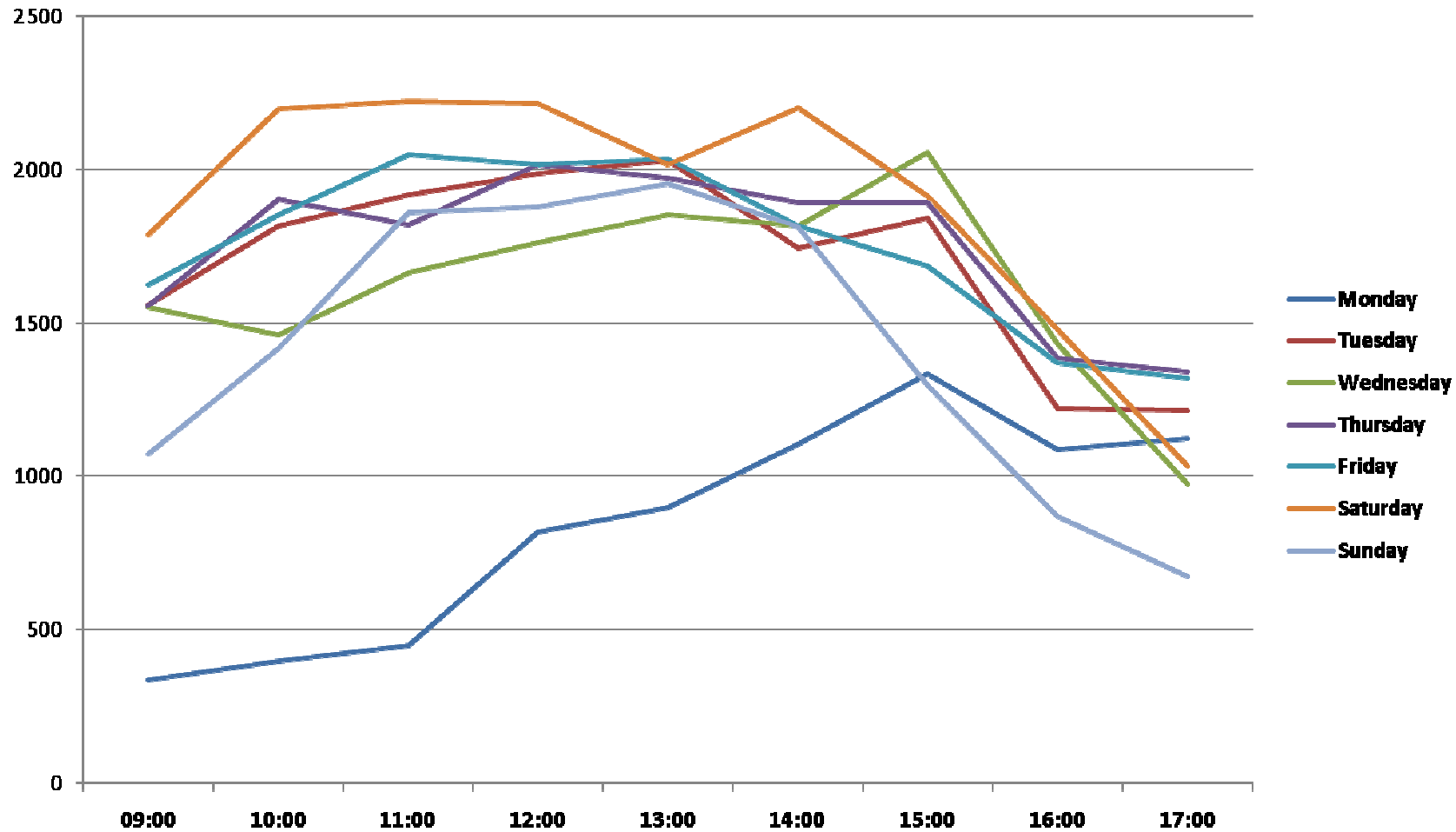
East Street Market has a surprisingly consistent draw, attracting more than 4,500 visitors per day to the regular Tuesday to Saturday market. The Sunday market too has a popular following, attracting just over 4,000 visitors per day in spite of shorter trading hours. The impact of market closure on Mondays is starkly evident, with an average draw less than half of weekdays; we would assume closure on a Wednesday would trigger a similar drop



Hours counted: 09:00 – 17:00, per day average based on aggregate of 3 weeks, November 2013; Walworth Road entrance only

Footfall per hour by day

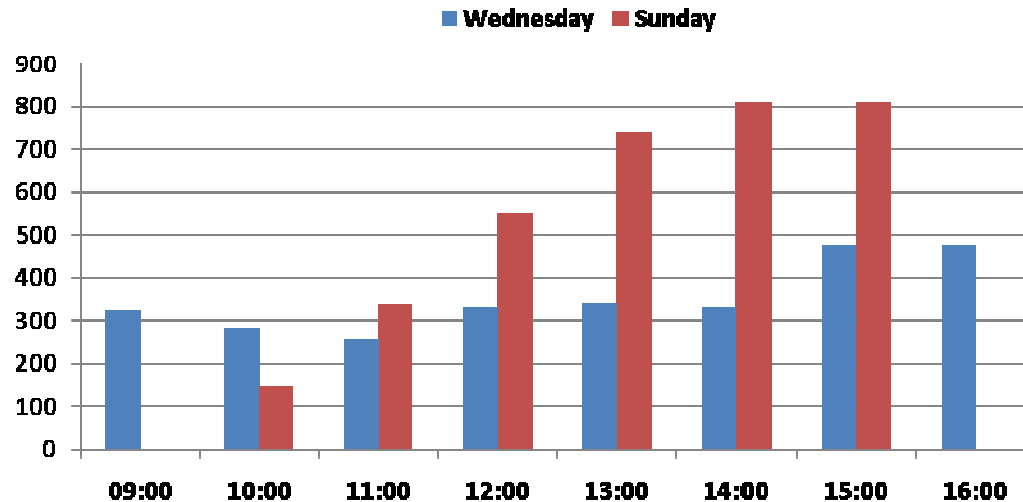
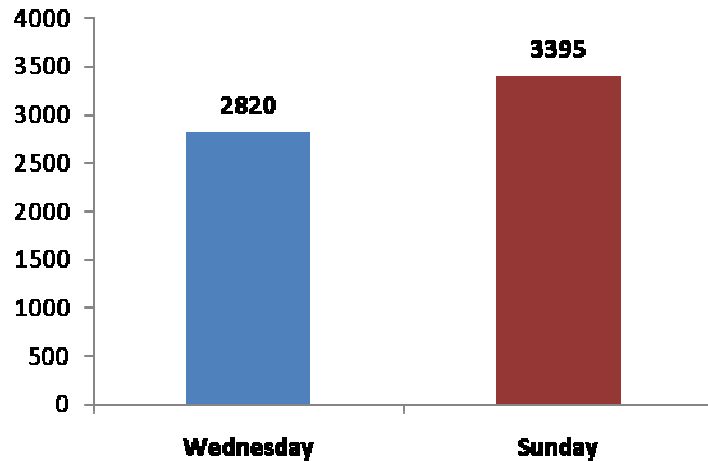
There is a consistent pattern of strong footfall between 10am to 1pm, with activity around the market falling off steeply from 3pm. On Mondays street traffic grows slowly through the day, but holds its level between 3pm to 5pm.



Hours included: 09:00 – 17:00 average of 3 weeks, November 2013; Walworth Road entrance only

Portland Street Count

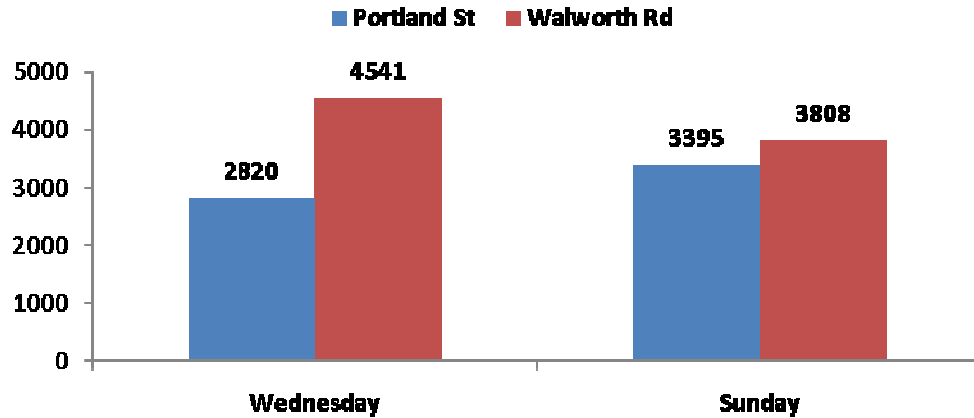
On weekdays and Saturdays activity and footfall is focused towards the Walworth Road end, whereas Sundays reverse the picture with more stalls and visitors located around Portland Street. From this location it's clear that the Sunday Market, despite shorter trading hours, is not the poor relation to Wednesday



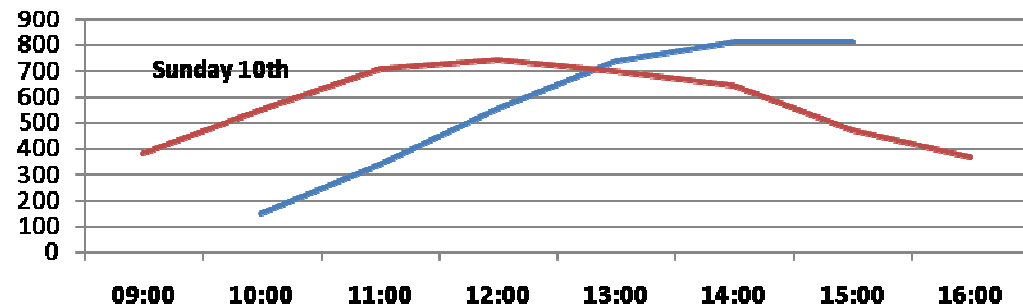
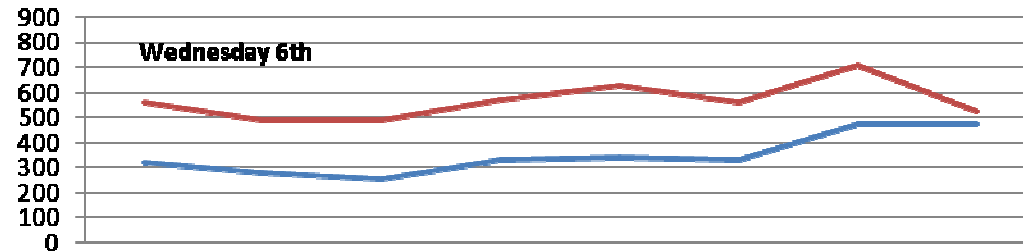
Wed 6th Nov & Sun 10th Nov
 Wednesday - 09:00 – 17:00
 Sunday – 10:00 – 16:00
 Portland Street crossing only

Weighing Walworth Road vs Portland Street

This picture must be seen in the context of a single week of counting, and different counting arcs. But this shows that there are times when activity in the middle of the market matches or betters the Walworth Road End.



NB : Manual count on Portland Street of both street and pavements; electronic count at Walworth Road covers only the street



Wed 6th Nov & Sun 10th Nov
 Wednesday - 09:00 – 17:00
 Sunday – 10:00 – 16:00

Headlines and recommendations

Understanding East Street Visitors – Headlines

- Mid-life visitors aged between 35 to 44 are the strength of the East Street visitor profile. At weekends the market is failing to attract younger visitors aged under 25
- The visitor profile is dominated by the cash-starved *Urban Adversity* type. But note that on Sundays one third of visitors are from the free-spending *Rising Prosperity* type
- The shops are no kind of draw for visitors. Three quarters say they are there to shop the market, and only 6% for the shops
- Average spend per spending trip to the market is £14, equating to £138 pcm, about the same as a smallish Value shopping centre like Elephant & Castle
- There appears to be limited cross-spending between shops and market
- Visits to fruit & veg stalls exceeds visits to all other stalls put together

Understanding East Street Visitors – Headlines (2)

- Shopkeepers believe 2/3 of their customers also shop the market; and that £4 in every £10 they take comes from market shoppers. Managers of cafes and pubs have a different view, claiming their own clientele independent of the market
- Generally shopkeepers are anxious about further closure of the market. In fact about half are asking for 7/7 opening
- Footfall is steady at about 4,500 per day between Tuesday to Saturday. Sunday is valuable, attracting about 4,000 per day on shorter trading hours, and attracting a wealthier clientele. Average for Mondays is less than half of other days
- The success of Sundays shows how footfall and activity can be moved up or down the street by imaginative placement of stalls

Understanding East Street Visitors – Recommendations

- We see possibilities to recruit new shoppers via :
 - ❖ Promotion to students
 - ❖ Better cycle facilities
- Sunday's market shows it's possible to draw wealthier shoppers onto East Street. So later closing, with a tailored offer, may attract young professionals resident in the area after work
- Full closure on any day is a risk, as almost half of visitors say they wouldn't be able to come on another day
- Sunday is (relatively) a magnet for wealthier shoppers – so closure would be a backward step
- We fear closure on Wednesday would leave Tuesday as an orphan, which may become neglected by traders and visitors
- On our evidence, Tuesday may be the day to consider for closure if necessary