Lewisham High Streets Survey

Lewisham

The Independent Black, Asian, and Minority Ethnic businesses head count and survey of ten Lewisham high streets, 2021

Survey conducted by London South Bank University for Lewisham Council
23 June 2021

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Introduction

Lewisham is one of the most diverse boroughs in the country. You only have to walk along our high streets and through our town centres to see this reflected in the many shops and services on offer

We are the first local authority in the country to commission this annual headcount study of our high streets. We did it because we want independent retailers of all ethnicities and backgrounds to know there is always a home for them here in Lewisham.

That said we know the pandemic has been devastating for our business owners and has ultimately changed the retail landscape. All too often during periods of economic uncertainty, it's the small family-owned shops and services that can quickly and quietly disappear from our communities.

While we already offer a robust programme of support and promotion for local businesses this census is about helping our high streets get back on their feet, providing a deeper understanding of the challenges specific to our retail sector. The findings make for interesting reading.

70% of retail businesses in Lewisham are independent. As we take our next steps as a borough, they will play a pivotal role in rebuilding our local economy and creating employment opportunities for local people. In order to weather any potential storm, they want to become more self-sufficient. So we are developing a programme of targeted practical support, offering them the tools they need to build resilience and flourish.

Two thirds of our independent businesses are owned by Black, Asian and Minority Ethnic entrepreneurs. Race is always a key consideration for us. As a Council we are working towards building an economically sound future in which every person and every business in Lewisham can flourish and succeed, regardless of background

We recognise that BAME business owners may face systemic inequalities. This has been brought back into sharp focus during the pandemic with the Black Lives Matter protests and the disproportionate number of COVID-19 deaths among ethnic minorities.

While our BAME businesses have shown incredible resilience in the past, if we wish to protect the diversity of our high streets, now is the right time to take a more robust approach to supporting them. This survey shows there is still plenty of work to be done to build trust between BAME entrepreneurs and the Council.

We are taking immediate steps to address this, including conducting more meetings face-to-face and partnering with trusted business networks to offer support. In fact we are offering discounts to a selected number of BAME-owned businesses on Federation of Small Businesses memberships.

Local retailers need an increase in footfall. Our high street business owners have told us they rely on in-person sales to bolster revenues, but footfall levels are still perceived to be lower than they were pre-pandemic. We are thinking more creatively about options for increasing footfall which includes driving down our shop vacancy rates – even though they are in line with the rest of the country.

We are proud of our vibrant high streets and want to ensure they have a bright future. We are using this census to produce an overall vision and drive the reform needed to empower our business owners so they are in the strongest possible position as we emerge from the pandemic and beyond.

Damien Egan
Mayor of Lewisham

Councillor Kim Powell
Cabinet member for
Business and Community
Wealth Building

1. Introduction

a. Background & Context:

As part of efforts to support Lewisham's high streets, the Mayor of Lewisham, Damien Egan has committed to undertake a new annual survey, becoming the first council to physically go out, every year, and count and publish the number of independent retailers and the number of Black, Asian, and minority-ethnic (BAME) owned businesses on Lewisham's high streets- https://lewisham.gov.uk/mayorandcouncil/mayor/mayor-s-annual-report

Lewisham Council commissioned Southbank, University of London to undertake an independent survey of:

1. The number of Independent and BAME businesses on Lewisham main high streets.

2. An impact analysis of the footfall and key top-line factor(s) that might influence their survival.

Important Note: The term BAME is used throughout this report only as an abbreviation for Black, Asian, and Minority Ethnic. Its use does not reflect the view that it is representative of one ethnicity grouping.

b. Study Objectives:

The project aimed to answer the following questions:

Question One: What is the headcount of independent and BAME businesses on the ten major high streets in Lewisham? In contacting these businesses individually, efforts should be made to encourage them to sign onto the council's email database.

Question Two: What are the key top-line factors impacting independent and BAME businesses survival, and specifically BAME inequalities in awareness of finance and support?

Question Three: What are the relative footfall densities on the Lewisham high streets and what is the make-up of high street visitors?

Question Four: What is the commercial temperature? How confident are businesses, what challenges do they see, and how do consumers view the high streets they use?

Answers to these questions provided in this report aims to contribute to the council's economic recovery and renewal planning around place-based leadership and specifically initiatives to protect local high streets. It will also enable the council to identify and seek to address inequalities of business engagement and support going forward.

c. Background to the research

Context and reasons for optimism. The pandemic had a dramatic impact on Great Britain's high street retailers from the largest to the smallest. Retail sales volume fell by nearly 2% in 2020 vs 2019, (the largest fall on record) and online sales rose to take up nearly 34% of the total[1]. Several of the biggest brands in high street fashion disappeared, to reappear online. Independent retailers on local high streets, always dependent on passing trade, faced the devastating cash flow impact of enforced closure or if they remained trading, reducing or collapsing footfall density.

Lewisham Council made substantial financial and other support available for its independent high street businesses as part of Government mandatory and discretionary grants schemes, as well as providing a further £2.4m financial assistance acting as commercial landlord with deferrals or foregoing some councils' commercial fees.

On the demand side, there is evidence that lockdown impacts might have been mixed for local businesses. During the second lockdown, consumer research conducted by Opinium[2] reported that:

- Nearly a third of UK adults claimed to have shopped in local stores
- Two in ten claimed they had not considered shopping locally before lockdown
- Three quarters agreed that it is important to support local businesses.

YouGov[3] reported an even higher proportion shopping locally for food and drink, at nearly 40%. This is hardly surprising when over half the UK adult population was working from home during the restrictions, and thus more likely to shop locally.

Context as restrictions eased. On April 12th 2021 non-essential retail, and some hospitality opened for business once again. The ONS reports[4] that following this easing of restrictions, retail sales volumes for May 2021 in Great Britain were 9.1% higher than in February 2020, although the picture is complex.

Underpinning the growth, non-food retail experienced dramatic increases in April and further rises in May 2021, while the return of hospitality and non-essential retail meant that online businesses, but also bricks and mortar food retailers, showed *declines* on the same period.

[1] The impact of the Coronavirus pandemic on retail sales in 2020. Office for National Statistics. Available at : https://www.ons.gov.uk/economy/grossdomesticproductgdp/articles/impactofthecoronaviruscovid19pandemiconretailsalesin2020/2021-01-28

[2] Living in Lockdown: Good for our Streets? The Drum. Available at : https://www.thedrum.com/opinion/2020/06/22/living-lockdown-good-our-high-street

[3] Could Covid-19 save the UK high Street? YouGov. Available at : https://yougov.co.uk/topics/consumer/articles-reports/2020/07/10/-covid-19-coronavirus-UK-high-street-local-effect

[4] Retail Sales, Great Britain, May 2021. Office for National Statistics. Available at: https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/may2021

The Lewisham high street headcount and survey was conducted two weeks after the re-opening of non-essential retail on April 17th, 2021 as part of the Government's Roadmap; the report looks forward as well as back from that moment in time.

2. Method

The programme consisted of five separate studies of the businesses and consumers in defined central locations on ten high streets across the borough (maps in Appendix 1). The ten high streets were:

- Lewisham Town Centre
- Catford Town Centre
- Deptford High Street
- New Cross Road
- Blackheath
- Lee Green
- Sydenham
- Forest Hill
- Crofton Park
- Honor Road

Research was undertaken in two waves by trained student researchers from the London South Bank University Business School.

In the first wave, teams of between three and five students visited each high street between 9.00 am and 5.00pm over two or three days between the 24th of April and 8th May.

During this wave, researchers:

- Conducted a full audit of retail premises in the designated locations; they were able to count and categorise 1255 sites, of which 770 contained independent trading, businesses.
- Completed 640 street-intercept surveys with high street visitors.
- Made over fifty hours of footfall observations across thirteen locations.
- Attempted to interview every independent business owner to collect the detailed ethnicity data required. In the event, just 279 interviews were successfully completed. There were two main factors for this level of response. The first was timing; the survey was conducted just one week after the 12th April reopening, and owners were extremely busy. The second was a reluctance to self-identify ethnicity at a granular level.

Therefore, a second attempt was made between 9th and 14th June 2021, this time with the benefit of the audit of independent businesses, to collect the required ethnicity data. It was established that by (if not at a more granular level)) using the higher-level categorisation (of Black, Asian, and Minority Ethnic or Non-BAME) and a quicker survey, a higher response rate was possible; achieving a sample size of 94%.

All interviews were conducted face to face, following the social distancing guidelines and policies defined by the London South Bank University research committee. Survey responses and retail audit data were recorded using the *Qualtrics* mobile phone app software and data uploaded centrally.

Business audits were conducted by observation, listing each premises within the defined boundaries by name, address, business type, and whether the premises were open for trade.

A particular effort was made to establish if non-trading premises were vacant or simply not trading at that time (for example some takeaway businesses opened only in the evenings), by follow-up observation and other enquiries.

All locations had weekday and weekend data collection. Businesses were defined as independent, or multiple if they were one of a number of businesses. This was established by further desk research, interview and/or prior knowledge.

Footfall observations were collected manually in defined central locations according to a methodology developed in consultation with commercial research agencies. High street visitors were counted individually as they crossed the observation points described on the high street maps (Appendix 1) and only adults were included.

Counts were conducted between 11.00 and 12.00 noon and 3.00 and 4.00 pm on each day so that data is broadly comparable. The count was time-bounded so that the measure of interest is the number of potential shoppers present on a high street at any particular moment. It is therefore considered immaterial if they had been counted once before at a different time, or on a different day, and so the data describes the numbers of shoppers available to buy in any identified time period.

Consumer Survey data was collected only within the bounds of each location. Students were trained to conduct street intercept interviews following a sampling method outlined in Miller *et al.* (1996, p.655). Interviewers were instructed to intercept the *"first eligible respondent they saw who was anywhere on the block as the interview period began"* repeating that process at the end of the first interview. This approach is designed to mitigate for gender, age and ethnicity biases in the sample, and every student in each team conducted interviews.

Although unfashionable nowadays, street intercepts benefit from comparatively low non-response and non-completion rates, but more importantly they give access to respondents that are knowledgeable about the retail location where the survey is being conducted. Over the ten high streets 640 usable interviews were completed.

Business Surveys researchers attempted to undertake face to face surveys with all businesses, but were able to complete 279 independent business owner surveys in the first wave by visiting each premises in turn. An ad-hoc appointment system was adopted with return visits if a store was busy, or the owner was not present.

Screening questions established if the business was independent, and if the respondent was the business owner, and interviews conducted in-store. The survey had a number of open-ended questions, often eliciting a detailed and sometimes lengthy response. The initial intention was to collect ownership-ethnicity data using this method, but the target could not be achieved in the time available in the first wave.

Wave Two Survey. In a fifth study, each high street was revisited over the course of a week to gap-fill the headcount of ownership-ethnicity. This was done from the audit of independent businesses by collecting at least aggregated ethnicity data (i.e., BAME/Non-BAME) in response to the previous reluctance of business owners to self-identify their ethnic group at a more granular level for the interviewers.

3. Post-lockdown, what is on offer on the High Streets?

The first objective for the study was to establish a headcount of independent, BAME-owned businesses on the ten main high streets in Lewisham, and this dataset has been supplied separately to the Economy, Jobs and Partnership Team. The data collected provide a useful descriptive snapshot of the structure of the retail offer on the high streets as they emerged from lockdown, including their relative position on a number of measures of vitality. These are reported next along with the headline results from the audit.

3.1 Multiples, Independents and Ownership-ethnicities

- 1255 business premises were identified within the defined high streets
- Of these, nearly 70% (864) were non-multiple businesses.
- 770 of these were observed as trading.
- 505 (66%) were found to be in Black, Asian, or Minority Ethnic ownership.
- Estimating from the first wave data, the largest ownership-ethnicity is Asian/Asian British (29%), Black/African/Caribbean/Black British owners account for 11% of businesses, and Mixed/Multiple ethnic groupings 6%. In all, there were nearly forty different ethnicities named among 279 businesses and the “Other Ethnic Group” category accounts for 20%.

Lewisham is proud of the diversity of its resident population and has reported elsewhere that it is the 15th most ethnically diverse borough in the country. This study is the first that a council has undertaken to establish a headcount of the diversity of its independent business population on its high streets.

Results confirm how closely Lewisham high streets reflect the population they serve and will enable the council to shape policies to support them.

Table 1: Headcount, Ownership & Ownership-Ethnicity

	Number	%
High Street Business Premises	1255	
Non-multiple businesses (independent)	864	69%
Trading during the survey period	770	61%

BAME/Non-BAME ownership of trading businesses		
BAME	505	66%
Non-BAME	217	28%
No Response	48	6%

Two thirds of independent businesses trading on Lewisham high streets are in Black, Asian, or Minority Ethnic ownership.

The more granular ethnicity data collected during the first-wave survey (Table 1a) reflect these numbers quite closely and may offer a reasonable first estimate of the underlying distribution of ethnic groups.

From this data the largest ethnic grouping of independent business owners is Asian/Asian British (29%). Black/African/Caribbean/Black British business owners account for 11% of the sample.

Table 1a. Wave One ethnicity groups

ONS Ethnicity Grouping	%	%
Asian/Asian British	29	
Other Ethnic Group (e.g. Arabs)	20	
Black/African/Caribbean/Black British	11	
Mixed Multiple Ethnic Groups	6	
		66
White		28
Refused		6

n = 279

The picture is very diverse. The sample included nearly forty named ethnicities across the 279 respondents.

3.2 Business Mix Diversity

Trading businesses were broadly categorised on each high street as:

- Services, e.g. Hairdressers, Nail Salons, Barbers
- Leisure, e.g. Restaurants, Takeaways, Pubs
- Comparison, e.g. Fashion, Hardware, Shoes, Accessories or
- Convenience. E.g. Supermarkets, CTNs, Off-Licences.

The diversity of the business mix is important in creating the overall draw for each high street and was measured using Simpsons Diversity Index.

This index (D) describes the probability of any two adjacent businesses in a sample being in the same category, taking account of the number of variables and the sample size, where 0 is uniformity and 1 is the highest possible diversity.
Across the borough (but with the exception of Lee Green) D values are within a similar range, reflecting a level of diversity that is in common with other similar high streets[5] and which shows Lewisham high streets to be offering a vital mix of retail offers across the categories.

Table 2: Retail Diversity in Lewisham

High Street	Trading	D	Service	Leisure	Comp.	Conv	Misc.
			%	%	%	%	%
Forest Hill	108	0.70	43	29	19	6	3
Honor Oak Park	35	0.75	40	20	20	17	3
Crofton Park	103	0.70	39	34	16	11	1
Sydenham	138	0.74	38	20	24	14	4
Lewisham	181	0.74	35	23	27	13	3
New Cross Road	128	0.71	32	40	15	10	3
Blackheath	109	0.73	30	24	35	9	2
Catford	117	0.75	26	34	16	21	3
Lee Green	19	0.82	21	26	26	11	16
Deptford	145	0.75	21	25	30	23	1
Average	108	0.74	32	27	23	14	4

Diversity in retail offer on all high streets but with an emphasis on service and leisure

The big picture is however that within the business mix, high streets are all now offering less Comparison (23%) and Convenience (14%) businesses than Service (32%) and Leisure (27%). This also reflects the way that consumers say they use high streets (see next section), which is now weighted less towards shopping, and more towards leisure, social and entertainment uses.

Table 2 reveals particular skews in the business mix that may be informative in explaining elements of high street vitality, and defining distinctiveness. For example, Service businesses are over-represented in both Forest Hill and in Honor Oak, while Deptford and Blackheath are still skewed more towards a comparison retail offer.

In Forest Hill, although there are 52 different types of business in 114 premises, 11% are estate agents (a similar proportion in Honor Oak). A further 20% of businesses in Forest Hill are restaurants or takeaways but serve over a dozen distinct ethnic cuisines. **There is variety and choice.** The more granular categorisation identifies

[5] See Oxford Institute of Retail Management, who have adopted the Diversity Index *within* comparison and leisure. https://www.sbs.ox.ac.uk/research/networks/oxford-institute-retail-management/past-research

forty-seven different cuisines in restaurants and takeaways across the borough, alongside many different regionally specialised food stores.

In Deptford and Blackheath, a higher proportion of the mix is represented by comparison retail. Both locations have independent fashion stores and hardware businesses while Blackheath has two bookstores as well as several interior design and accessory specialists. There is an average of three charity shops per high street.

3.3. The distribution of ownership-ethnicity of independent businesses

Table 3. The Distribution of Ethnic - Ownership

High Street	Total Premises	Independent Traders		% Independents Seen Trading		BAME Owned	
			%		*%*		*%*
Catford	130	71	*55*	70	*99*	54	*76*
Lewisham	217	143	*66*	120	*84*	94	*66*
New Cross Road	143	111	*78*	92	*83*	72	*65*
Deptford	179	143	*80*	127	*89*	86	*60*
Crofton Park	112	85	*76*	82	*96*	49	*58*
Sydenham	165	119	*72*	101	*85*	65	*55*
Honor Oak Park	35	31	*89*	31	*100*	16	*52*
Forest Hill	114	84	*74*	76	*90*	41	*49*
Lee Green	39	19	*49*	14	*74*	8	*42*
Blackheath	121	57	*47*	57	*100*	20	*35*
Totals	1255	863	*69*	770	*89*	505	*66*

The distribution of BAME ownership is higher in the high streets in northern part of the borough.

Despite similar diversity ratios, the ownership-ethnicity of independent high street businesses is not evenly distributed. Table 3 is ordered by the proportion of BAME-owned businesses and shows a wide variation from about a third in Blackheath to over three quarters in Catford, with the highest concentration in Catford, Lewisham, New Cross Road and Deptford, the locations in the northern part of the borough.

3.4 Vacancies and Non-Trading Businesses

If important measures of high street attractiveness are the range and the number of businesses, empty premises depress both metrics, simultaneously creating an impression that a location is unattractive to retailers, and further reducing consumer appeal. Eventually this can lead to a self-fulfilling downward spiral.

Retail vacancy rates are increasing nationally, reaching 14.1 per cent in the first quarter of 2021, which is a 1.9 per cent rise over the same period last year.[6]

Table 4: Vacant and Non-Trading Premises in Lewisham

High Street	Premises	Vacant		Not Trading		Total Empty	
			%		%		%
Deptford	179	16	*9*	14	*10*	30	*17*
New Cross Road	143	15	*10*	14	*13*	29	*20*
Blackheath	121	12	*10*	0	*0*	12	*10*
Catford	130	12	*9*	0	*0*	12	*9*
Lee Green	39	11	*28*	5	*26*	16	*41*
Lewisham	217	10	*5*	16	*13*	26	*12*
Crofton Park	112	9	*8*	2	*2*	11	*10*
Forest Hill	114	6	*5*	6	*7*	12	*11*
Sydenham	165	6	*4*	9	*8*	15	*9*
Honor Oak Park	35	0	*0*	0	*0*	0	*0*
Average	**126**	**10**	***9***	**7**	***8***	**16**	***14***

In Lewisham the study found the vacancy rate (Table 4) to be slightly lower than the London average (10%), with five high streets at half the national rate. While this is encouraging, a high number of premises were not seen to be trading at any point during the observations, and taking these into account, the total proportion of non-trading premises reaches the ***national*** situation on average, with two high streets in particular, Deptford and New Cross Road exceeding even that total, and the Leegate centre at almost three times. Leegate centre is currently under development with planning application forthcoming.

Both Deptford and New Cross have a high proportion of BAME owned businesses, so higher vacancy rate may indicate a higher risk to their sustainability.

It should also be noted that many more businesses (over and above those included in Table 4), were observed to be trading only intermittently, deciding perhaps to reduce costs and “make hay (only) while the sun shines”.

The impact of this strategy on overall high street attractiveness should be assessed in a further analysis, as should the status of “Non Trading” businesses which may well require additional support.

[6] Reported in the Retail Gazette, April 30th, 2021: https://www.retailgazette.co.uk/blog/2021/04/one-in-seven-retail-shops-now-empty-as-vacancies-rise/

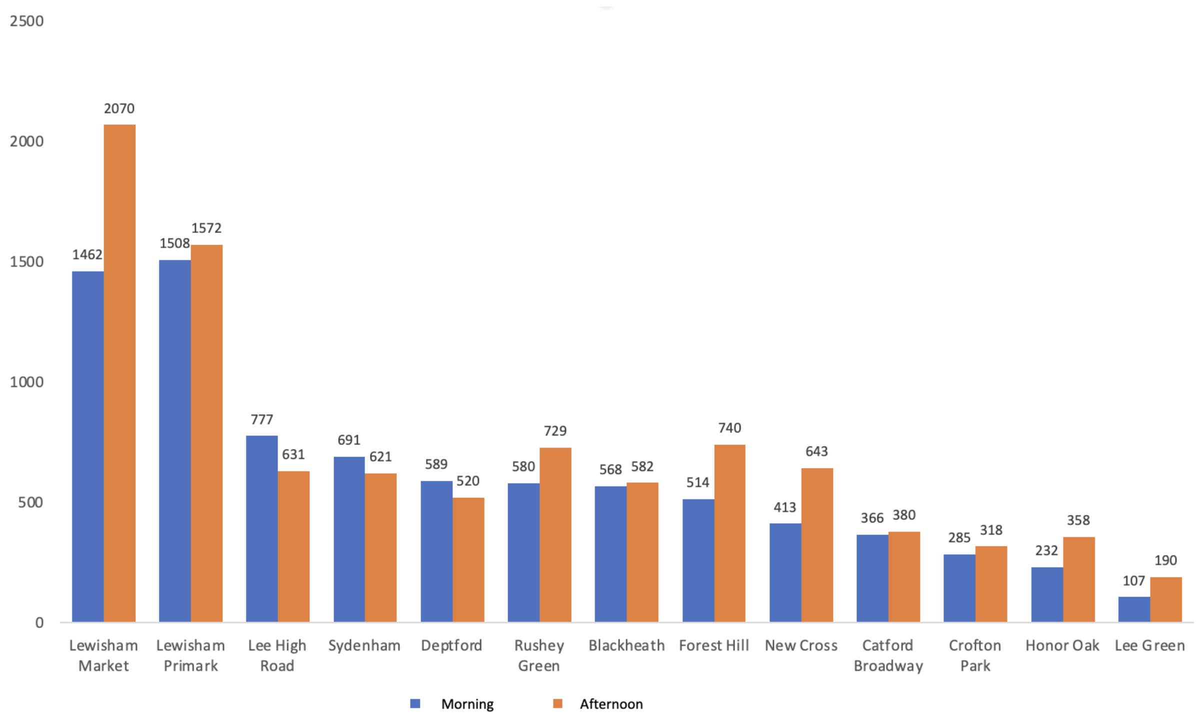
3.5 Footfall

A further objective of the research was to report and evaluate footfall. Footfall is an important measure of the available sales opportunity for retailers at a given time in a location.

Broadly, depending on category and brand size, retailers should be able to attract between 2% and 8% of passing footfall in any given hour and typically may be able to convert around half of the shoppers attracted in-store. Conversion in services is at far higher rates than in comparison retail since the decision to purchase is usually made outside store and may sometimes represent a dedicated trip.

Hourly footfall rates were collected at one or more locations on each high street in the morning and afternoon on weekdays and on Saturday.

Figure 1. Weekday Footfall Densities



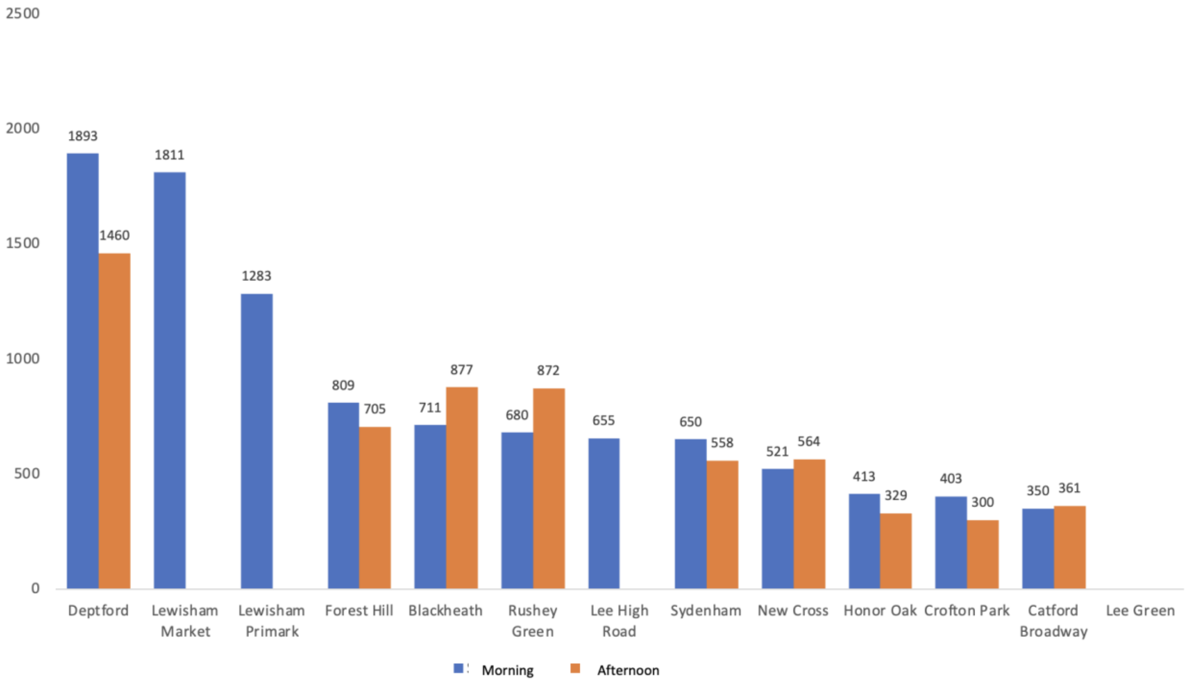
The centre of Lewisham is twice as busy as its nearest comparable location during the week

Figure 1 shows the comparative footfall across the high streets for a weekday morning and afternoon. There is an almost four-fold difference in footfall densities between the busiest and quietest locations, and the busiest parts of Lewisham are twice as busy as the next busiest high street, Lee High Road. It is also noticeable that in nine of the thirteen locations, afternoons are busier than mornings. Sydenham, Deptford, and Lee High Road (Lewisham) are exceptions.

Although data was not collected for Lewisham locations on a Saturday afternoon it is still clear that on Saturdays most locations are busier than weekdays, and that Deptford Market is an attractive weekend destination, with footfall density beyond

Lewisham Town Centre itself. An interesting observation is that the normal pattern for more local high streets on Saturdays (e.g., Forest Hill, Deptford, Honor Oak) is that mornings are busier than afternoons, and dramatically so at Deptford.

Figure 2. Weekend Footfall Densities in 13 locations



Deptford market is the busiest location in Lewisham on Saturday morning.

On most Lewisham high streets, footfall is relatively light across most of the high streets, apart from the key high streets of Lewisham and Deptford. In context, pre-Covid weekday counts at Westfield Stratford were in the region of 2,000/hr[7], more recent Saturday counts (April 2020)[8] reported about 800/hr in Walworth Road and 1,000/hr in East Street market.

Five Key Points

1. Lewisham has a high proportion of independent businesses on its high streets (69%), the majority in Black, Asian, and Minority Ethnic ownership.

2. The vacancy rate in Lewisham is at or below the London average, although many businesses still appear to be trading intermittently. This indicates that with the Council support offered and received, the high streets have emerged and at least survived so far, although not unscathed - there are casualties.

[7] Data reported in: Graham, C., Khan, K., & Ilyas, M. (2019). Estimating the value of passing trade from pedestrian density. *Journal of Retailing and Consumer Services*, *46*, 103-111

[8] Unpublished LSBU study for relocating Elephant & Castle traders, on behalf of Tree Shepherd.

3. The mix of trading businesses on each high street remains diverse at the broader retail category level, and rich at a more individual level. None of the ten locations suffer from the homogeneity that comes from an over-reliance on multiple retail. In fact, each high street can be considered to have quite distinctive characteristics, which could be useful in terms of promoting an attractive offer to broaden their consumer catchment.

4. It might also be argued that by retaining 70% independent ownership, overall vacancies have remained as low as they have. The loss of a Top Shop a Debenhams or a Peacocks nationally means that many high streets have then lost one or more stores, and Lewisham is not entirely immune to this as the loss of Peacocks (and Boots) in Rushey Green evidences.

5. On the other hand, footfall counts are *perceived to be by the businesses* comparatively low on almost every high street. This is important because it is a constraint on the ability of surviving businesses to repay loans and cover the fixed costs they will face again imminently. Independent businesses are individually unlikely to draw much trade on their own account, and therefore they must compete for what customers there are, and for whatever spending power they may bring.

   It must therefore be a priority to work **at the high street level** to support individual businesses, in order to enhance their sustainability.

4. The business-owner survey

As well as ethnicity data, the 279 business owners who completed the first wave survey also shared quite detailed information which may help to shape thinking about the potential future support needed. From this data we can:

- Describe the relative sizes and ages of businesses as a measure of robustness across the borough.
- Assess business confidence looking forward
- Summarise the main challenges foreseen at this point, and the help required
- Compare the awareness and uptake of Council support initiatives between BAME and Non-BAME owned businesses.

4.1 Business resilience and confidence

At the time of the survey, 10% of businesses described themselves as being less than a year old, therefore although they have experienced an unusually tough first year, they have survived.

A further quarter of the businesses were under three years old.

Almost half (47% of all respondents and 42% of BAME-owned) were well-established and had been in business at that premises for over five years.

Almost two thirds (63%) of the sample employed between one and three people and a quarter employed up to six. Retailing (since it always delivers a service) tends to employ more than other SMEs of a similar size, and therefore wage costs quickly become burdensome at low turnover.

Restrictions did not hit all businesses equally, and over half the sample (54%) maintained the staff they had through last year, although a quarter (27%) offered fewer paid hours. Of the remainder, 13% of businesses had staff on furlough and just 13% had let people go permanently.

In terms of new business processes, while many business owners had been using delivery services, click and collect or phone and email ordering, the intention to continue with these was consistently around 40% lower, indicating that almost half considered the initiatives to be unprofitable or inefficient.

In fact, 77% of businesses reported that most of their sales in the previous week had been *off*- not online which emphasises the resilience of the original business model over the new.

As to the future, we asked how optimistic owners were that sales would return to pre-Covid levels and here there was a big difference in confidence by ethnicity. 52% of non-BAME respondents were confident or very confident compared with just 32% of BAME business owners.

The difference was also reflected in current estimations of footfall – 27% of non-BAME owners assessing their high streets as busier, compared with just 8% of BAME business owners.

And again, in terms of recruiting, non-BAME businesses were over twice as likely (34%) to be hiring in the next six months as BAME-owned businesses (15%).

4.2 The biggest challenges faced

We asked respondents to name the single biggest business challenge they faced.
A wide range of answers were re-coded and clustered in seven categories.

- **29%** identified low footfall as the greatest challenge
- **21%** described mixed challenges partly in their control, such as that were marketing issues, brand awareness and staffing costs ranked highly, as did theft, and pressure on margins from cost increases, unreliable suppliers and difficulty in raising selling prices.
- **16%** identified finance and cash flow challenges requiring outside intervention
- **8%** identified consumer confidence as a barrier to increasing sales
- **5%** believed competition on the high street to be the main challenge

Table 5. Business challenges

What is the biggest challenge facing your business going forward? (Name one)	
	%
Lack of Footfall	29
Marketing Awareness, Cost and Supplier, Staffing, Theft, Margins	21
Finance & Cash Flow	16
Covid related - a further lockdown	11
Sales and Consumer Confidence : restrictions on ability to trade	8
No Response	8
No Challenges	6
Competition	5

Lack of footfall the greatest challenge

4.3 Awareness and uptake of available Council support

Following from this question, we asked respondents what support they would like to receive to help with these challenges.

The question was not open, instead respondents could select as many as applied. In the analysis in Table 6 the responses are given as percentages of BAME and Non-BAME respondents.

The picture it gives is that there is little difference between the two groups – both identified the same issues in roughly equal proportions. While access to finance is the biggest demand, a fifth asked for better signposting to the information they need.

Table 6. Types of support required

What type of council support would help you with this	BAME	Non BAME
	%	*%*
Financial	74	70
Business Support Programmes	35	33
Access to Mentoring	13	11
Signposting to info	21	20
Other	13	17

Little difference between ethnic groups.

When we asked an awareness and usage question about specific council initiatives however, the analysis (Table 7) revealed a pattern between the two groups in that BAME business owners were less aware of the available support, and of those that were aware, they were consistently less likely to have used it.

The gap is not great on average (12.5%) but for individual businesses, lack of awareness and take-up of available support initiatives may well become critical as other protections are shortly withdrawn. Additional Restriction Grants appear to be an exception, as is the uptake of restart grants.

Table 7. Awareness and Uptake of Council Initiatives

Which of these initiatives are you aware of and which have you used	Aware		Used	
	BAME	Non-BAME	BAME	Non-BAME
	%	%	%	%
Restart Grants	69	73	66	59
Additional restriction grant	41	40	19	18
LLW business rates reduction	38	45	23	28
Trading Safely Web Pages	24	28	15	21
Business Awards	21	27	12	17
Pavement Licences	20	26	11	18
Average	**36**	**40**	**24**	**27**

….but a difference in both awareness and uptake of Council support

Finally, when it comes to the shape of the high street there are strong conflicting views. Of those business owners who expressed an opinion, 29% believe that free parking would improve trade. Others however are more concerned about improving the environment with more green space, more frequent cleaning, and more security (19%), or closing their high street to traffic (9%).

11% asked for greater council intervention in planning permissions to restrict competition, while some called for big brand retailers to open.

On particular high streets (Deptford and New Cross) there were calls for more banks, post offices and free ATMs both as a draw, and an incentive to spending.

Five Key Points

While this data reflects the views of those business owners who responded to the survey in wave 1, it might still be perceived that:

1. The biggest challenge for the future, identified by a third of respondents, is footfall – the key to generating enough revenue to cover the substantial costs that are now coming down the track for the first time since lockdowns started.

2. Business confidence is not uniformly high, and this is not surprising, but it is lower than the average for the BAME business owners on several measures. Tables 5, 8 and 9 In Appendix 2 Table 5 indicates differences in stated

confidence, Table 8 in willingness to employ and Table 9 in perceptions of current footfall densities between BAME and non-BAME respondents. There may be particular reasons why this is so, and these should be further investigated through follow-up engagement.

3. A similar gap is identified in awareness and take up of several Council support initiatives. As above, this should be explored further through follow-up engagement.

4. Almost half of the independent businesses surveyed (47%) have been trading in the same location for over five years. These businesses are likely to be a repository of local knowledge and experience, and it may be possible and useful to tap into this on each high street and develop plans in the community that would improve the trading environment, particularly to raise footfall again.

5. Many of those who completed the survey appear to be motivated to trade their way out of their difficulties (Tables 5 & 6) if they can. Their challenges are however many and varied relating to the economic impact of Covid as well as prior issues. Calls for better signposting to information could be addressed by offering a single point of contact for independent business owners.

5. The Consumer Perspective

The final objective of the study was to deliver a better understanding of consumer behaviour and sentiment on Lewisham High Streets coming out of the Covid restrictions, including whether any new habits were particularly “sticky” with potential impact on future sales.

5.1 The consumers on the high street

A clear pattern of usage emerged from this study, which can be described as “little and often”.

Of the high street they were interviewed on:

40% of respondents said they visit every day
34% more said they visited every other day.

Blackheath, among the ten high streets is an exception, with only 25% visiting daily, and 40% rather than 25% of occasional visitors, so therefore it appears to be more of a destination for more of its visitors than other high street locations.

The reason for the main pattern is obvious; 73% of the sample live locally to the high streets they were interviewed on, and 30% work locally.

This also affects the mode of transport used to get to the high street, which is most commonly on foot (46%) or by public transport (35%).

It also affects the uses of that high street. The biggest attraction identified for each high street by its visitors was found to be **convenience** (Table 8), with **range of shops** second (a third of visitors at 32%).

Table 8. What attracts you to this high street?

Main Attraction	%
It's convenient	60
The range of shops	32
A specific shop/bar	20
The range of places to eat and drink	16
A good place to meet friends	14
Other	21

It's convenient

Of the many reasons to visit a high street (often) – shopping, socialising, eating, and drinking – none seem to rate very highly except convenience.

5.2 The main uses of the high street

Using an open-ended question to ascertain the main purpose for being on the high street, and after recoding, responses fell into four main clusters.

34% were shopping
21% were there to eat or drink and/or meet friends
30% were travelling to or from work, or exercising
11% were undertaking "life administration" such as banking or visiting a dentist.

A recent GLA report[9] that asked the same question found that 45% of high street visits were non-retail related; that proportion in Lewisham seems higher, at 66%, yet only a fifth of visitors interviewed were planning to eat or drink. This appears to be uncomfortable news, because many independent food and drink businesses must then face a constraint on the potential value of total footfall.

It should be noted though that *all* respondents were expecting to spend some money at least during their visit. However, across all locations and respondents, intended spend was found to be low: 41% suggested less than £10.00 and a further 36% between £10.00 and £30.00. That distribution was found to be fairly consistent, with the exception of Blackheath and Crofton Park, where slightly more visitors (44%) said they intended to spend between £10.00 and £30.00.

[9] GLA report London's High Streets Face Long Term Challenges. Available at: https://www.london.gov.uk/coronavirus/londons-recovery-coronavirus-crisis/recovery-context/high-streets-all#acc-i-61472

Recent MasterCard data provided by Lewisham Council from the Greater London Authority's High Streets Data Service, indicates that spending indexed on pre - Covid levels in Catford, Deptford and Lewisham town centres, and in the local high streets has recovered. In Blackheath it has not. The location seems to draw visitors from further afield to eat and drink which may partly account for this. None of its hospitality businesses could fully trade during the restrictions, and from our headcount, there are several premises, such as Café Rouge, Aqua and others on Montpelier Vale that are now vacant. Since the location relies on hospitality it may not be firing on all cylinders yet.

Generally too, respondents did not consider that, compared with other high streets, "this high street is an inviting place to spend time outside, with friends or for a meal."

Although 46% agreed it would be inviting for a coffee, 26% said that "this high street" didn't compare well for anything outside. For those on the high street, Forest Hill and Crofton Park scored more highly for a meal outside (both over 50%), and Blackheath for a visit to a pub.

These findings therefore support the GLA report in suggesting that High Street visits are now less for shopping, particularly comparison shopping, and more about **leisure and top up convenience purchases.** But this seems to be *an opportunity* at this point at most Lewisham locations.

On the consumer adoption of online retail, responses reflect the rise in grocery delivery with 52% saying that they had started using this service during lockdown.

A further 40% of high street visitors said that they had started using home delivery from independent restaurants.

When asked if they would continue with this now, show a drop-off with only 40% agreed they would continue with multiple supermarket deliveries, 30% with local restaurants, and a similar number for local shop deliveries.

While this must certainly support local business, it does not in itself contribute to high street footfall, and the impulse purchasing that might follow for *other* retailers.

Nor does it add to any sense of community, although it indicates that perhaps these new habits will not remain entirely persistent as high streets continue to open up.

On the other hand, the study found that many respondents had taken up new exercise habits during the lockdown, habits which took them to new places.

Almost seven in ten respondents had spent more time outside in Lewisham's award-winning parks. Four in ten had used the new cycle ways and designated walking routes, and 27% said they had spent more time exercising or walking on the high streets.

When asked if they would continue with these new behaviours, almost 70% said they would. These good intentions might then remain a driver of footfall after lockdown, and even encourage regular but limited spending increases in cafes and convenience stores.

5.3 Consumer Confidence

Despite the long lockdown restrictions, confidence was not found to be particularly weak, although Covid had struck many economically, close to home. Over 40% said that they knew or were related to somebody who had lost a job because of the pandemic.

Nevertheless over 60% felt that they would be as financially secure in six months' time as they were today – not an improvement, but not a decline. And this may be positive for the high street if it can be translated into high street spending.

5.4 Competition for footfall between high streets

To establish the extent of the competition between high streets, and therefore the nature of the pressures on footfall at each location, respondents were asked to name the high street they had visited most recently, before this one. This establishes the penetration of competing locations at the focal site, and hence the strength of draw from each.

Table 9 shows the top five high street competitors for each location, including the proportion of their repeat visitors, and the concentration of the competition (i.e., the sum of the percentages) within the top five.

Table 9. Duplication of High Street Locations

	%		%
Catford		**Lewisham**	
Lewisham	40	Lewisham	21
Catford	17	Westfield	15
Bromley	9	Bromley	12
Oxford street	6	Deptford	7
Deptford	3	Catford	5
	74		**60**
New Cross Road		**Deptford**	
Lewisham	29	Deptford	31
Deptford	12	New Cross	18
Peckham	9	Lewisham	11
New Cross Road	8	Westfield Stratford	9
West End	7	Brent Cross	7
	65		**76**

Sydenham	
Catford	21
Lewisham	10
Crystal Palace	9
Sydenham	8
Bromley	6
	54

Crofton Park	
Lewisham	23
West End	13
Brockley	6
Catford	6
Bromley	6
	54

Forest hill	
Sydenham	13
Forest hill	10
Catford	7
Lewisham	7
West End	7
	43

Honor Oak	
Honor Oak	15
Lewisham	10
Catford	10
New Cross	7
Bromley	5
	46

Competition for high street footfall is mainly from local high streets

The analysis of this data is revealing.

- Lewisham Town Centre draws substantial footfall from across the borough, and higher levels from locations that are nearer or with more convenient direct transport links.
- At the time of this survey, very few visitors to any Lewisham high street had recently visited either the West End or a major shopping centre such as Westfield Stratford or Bluewater. Competition was almost entirely local.
- The exceptions are Lewisham itself, where 15% of traffic had recently been in Westfield Stratford, and Crofton Park where 13% had been in the West End.
- Otherwise, about half the shoppers on any Lewisham high street are very largely the shoppers of *other* Lewisham high streets.
- Although this may be an effect of consumer hesitancy or adhering to social-distancing guidance to stay local, non-essential retail had been opened for at least a fortnight at the point of the survey, and there is little evidence of pent-up demand leading to a rush to the West End. Demand is contained nearer to home.

Five Key Points

1. If high streets are no longer for "shopping" - then what are they for? Most consumers seemed to feel "I'm here because it's convenient - not because I particularly like it". Consumers can satisfy many immediate needs by topping up on their doorsteps, as they pass through. But spending little & often indicates treating the local high street like one big convenience store, and not as a destination to be "savoured" more widely. There are opportunities to:
    - Improve each high street environment overall
    - Increase awareness of the breadth of the existing offer.

- broaden use and increase spend

2. Everyone interviewed intended to spend *some* money, and this represents opportunity, particularly for businesses that can establish a relationship with shoppers who visit often and habitually. But most spend is no longer in comparison goods stores & only about 15% in hairdressers, nail bars and other service businesses. This reflects the business mix identified in the retail audit, and a better understanding of changing needs and wants should be central to developing marketing strategies.

3. If the nature of the competition between Lewisham high streets is a permanent characteristic, then it is both positive and negative. It means that Lewisham retailers even in the busiest locations are not drawing traffic from *outside* the borough to any great extent. This is a limiting factor for footfall, so initiatives to extend catchments are desirable, particularly by exploring the transport hubs to identify potential visitors within easy (but not necessarily proximate) reach.

4. To help this effort, because of the diversity of its independent traders, every high street has a distinctiveness or perhaps a "specialism" that could be built upon and developed in communications inside and outside the borough. Blackheath and Deptford both offer a rich variety of leisure attractions, and shopping in Lewisham Town Centre is already a draw. Working with each high street to identify a specific positioning would be useful focus for a place-based strategy which could then be developed.

5. For example, more could then be done to promote the high streets locally beyond their routine convenience and functionality, to raise awareness of the diversity of existing attributes and qualities. The objective would be to increase high street footfall draw, increase the repertoire of shops patronised by high street users, and increase average spend per visit.

6. Recommendations –

1. **More difficulties around the corner for Retail sector** recovery is still considered fragile, and many independent businesses were already marginal going into lockdown. The end of business rates relief and the moratorium on evictions due to non-payment of rent are both likely to be threats for high street businesses in Lewisham.

   Individual traders may require immediate support to negotiate a short-term crisis, and the evidence shows that many want to trade out of trouble if they can. Some expressed an unwillingness to take out further debt and many might only need advice on cash flow management or access to funds.

   Recommendation

It is desirable to prepare for a rapid response which would benefit both business owners and the council. A proactive programme offering initial support and advice in the form of FAQs, might be immediately helpful in encouraging timely requests for support. One single point of contact might be another.

2. **Diversity of high street offer.** Multiple brand names can attract footfall, but they also act as category killers. There will be further multiple retail losses, and these will damage high street vitality wherever the outlets are located, with consequent loss of jobs locally.

   Recommendation

   Support the local high streets to retain and attract independent businesses, and to diversify beyond a retail offer to include other uses such as hospitality, cultural and community uses so that they are attractive places to visit and spend time.

3. **Black, Asian and Minority-Ethnic businesses make a significant contribution to Lewisham's high streets.** Lewisham high streets benefit from the richness of their ethnically diverse independent businesses. BAME-owned business constitute nearly 70% of independent high street traders. The evidence gathered in the study has however identified differences in the awareness and uptake of various business support initiatives between ethnic groups. It also highlights quite large variations in the level of business confidence looking forward. This indicates a need for focussed support.

   Recommendation

   The headcount can be used to target follow-up with an addressable audience of BAME businesses, perhaps even with some face-to-face initiatives. A first step would be to identify reasons for the identified gaps, and address these, developing policy to support and build the BAME owner segment so that it continues to contribute to high street vitality for the benefit of all communities.

4. **Increase footfall levels in high street.** Current footfall levels are *perceived by businesses to be* relatively low. Independent retailers live and die by footfall. Although there is a perception that competition can be limited on each high street for the benefit of particular categories of trader, the real issue is the vitality of the *whole* high street for the continuing benefit of the local economy and communities. Retail businesses are proportionately larger employers than other types of SME and success in local retail provides greater local economic benefits.

   Recommendations

   Environmental improvements, particularly in cleaning, lighting, green spaces, and security were called for by businesses and consumers alike.

Individual high street marketing strategies could then confidently be undertaken to identify distinctive positioning for each location but based on its existing offer.

Extend catchments on each high street, preferably to attract visitors beyond the borough, taking advantage of the existing transport connections. The high streets are well connected.

Objectives for each location should be resolutely focussed on increasing:
- Footfall densities, by attracting new visitors to each
- Businesses visited regularly
- The share of overall consumer spend in, rather than outside, Lewisham

5. **Vacancy rates are similar in Lewisham to elsewhere.** Vacancy rates are not currently high in relation to London-wide or national levels but in Lewisham there also appear to be many businesses that are not opening regularly and others which may already have ceased trading. These gaps in the high street reduce attractiveness, and ultimately the impression of vitality.

Recommendation A longer term view may be to encourage innovation and entrepreneurial motivation in the community, perhaps establishing a pop-up programme to trial new retail formats and offers in different vacant locations.

In clusters, perhaps viewed as business incubators, these might bring footfall-driving benefits for each high street adding to the variety on offer.

7. Lewisham Council Action Plan

1. Black, Asian and Minority Ethnic businesses make a significant contribution to Lewisham's high streets. *Lewisham high streets benefit from the richness of their ethnically diverse independent businesses. BAME-owned business constitute nearly 70% of independent high street traders.*	
Concerns	Less awareness and uptake of various business support initiatives among Black, Asian, and Minority Ethnic business owners vs non-Black, Asian, and Minority Ethnic Lower levels of business confidence looking forward. This indicates a need for focussed support.
LSBU recommendations	A first step would be to understand reasons for the identified gaps, and address these, developing policy to support and build the Black, Asian & Minority-ethnic owner segment so that it continues to contribute to high street vitality for the benefit of all communities.
Measures already taken by the Council	**Targeted engagement:** - High Streets Independent and Black, Asian & Minority-ethnic Businesses' Headcount and Survey

	- Regular business engagement directly and through partners' networks such as Federation of Small Business and Blueprint for All to build insights and communication **Shop Safe & Shop Local Campaign:** - A package of reopening support and promotion for local businesses through multiple channels – in person, telephone, e-mail, webinars, social media, online toolkit, eNewsletters, editorial, leaflets, postcards, stickers, OOH advertising, partners' networks - Christmas online markets promotion - Free campaign tote bags for businesses and shoppers which provided very positive engagement between LB Lewisham and businesses and businesses with their shoppers. **Engagement:** - Business education, encouragement and enforcement (last resort) visits. Since enforcement patrols in January to June 2021 – 21,584 business checks undertaken with high compliance, only 12% required any sort of intervention in the form of further advice and guidance to the proprietors. - Sector-specific and grants webinars to support the roadmap to reopening of the high streets
Next steps	**Priorities for next 6 to 12 months.** **Practical Business Engagement, Communications & Support:** We are implementing a plan to support our BAME business owners and ensure that, alongside other independent businesses in the borough, they are in the strongest possible position as we come out of the pandemic. This may include: - Face to face business engagement to build relationships and understand barriers and needs at a granular level - Join up with the Federation of Small Business (FSB) to encourage membership through discounted fees. - Engage with local Black, Asian & Minority-ethnic businesses through trusted partners such as FSB and Blueprint for All's networks - Identification and working with local High Street Champions – support peer to peer information dissemination - Develop and deliver tailor business support shaped via insights from business engagements - Encourage and provide guidance to raise their business profile through The Mayor of Lewisham Business Awards 2021, the London Borough of Culture 2022 programme, and online via support portals **Resources:** - Use of Additional Restriction Grant and the Welcome Back Fund. - Signpost to Council's business support and eNewsletter https://lewisham.gov.uk/myservices/business/business-support-during-covid-19 - Signpost to partners' resources, e.g. Federation of Small Business's online 'recovery ready' hub. https://www.fsb.org.uk/campaign/recovery-ready.html or the London Business Hub's Property Advice Service

	https://www.businesshub.london/search/?_sf_s=property%20advice%20search - Work in partnerships to leverage existing programmes to maximise support of the high streets and local supply chains.
Longer term measures	**Priorities for next 1-3 years.** **Future Lewisham:** The Council is working towards building an economically sound future in which every person and every business can flourish and succeed, regardless of ethnicity or background. As part of the Economic Recovery & Renewal Plan track annual head count of independent & Black, Asian & Minority Ethnic businesses on the high street (subject to funding) to assess whether targeted support is improving business outcomes and re-evaluate measures if necessary.
2. More difficulties around the corner for retail	
Concerns	Retail sector recovery is still considered fragile. Individual traders may require immediate support to negotiate a short-term crisis, and many want to trade out of trouble if they can.
LSBU recommendations	It is desirable to prepare for a response which would benefit both business owners and the council. A proactive programme offering initial support and advice in the form of FAQs, perhaps in a flier, might be immediately helpful in encouraging timely requests for support.
Measures already taken by the Council	**Single point of contact –** The council engaged with businesses with over 1,410 e-mail queries up to end June 2021 – ongoing, manned daily and provide internal triage and warm handover to appropriate support across the council **"One Voice"** – Officers adopted a joined-up, cross-council approach to help local businesses engage with the council, to re-open safely and successfully from the national lockdown. Provided comprehensive education on current guidance and available support, and encouragement to comply thereby reducing the need for formal enforcement activity. **Financial support**: - Administered14 different grant schemes since restrictions were imposed in March 2020 with over 14,000 COVID business grants totalling close to £76m to the 4th July 2021. Of which, the majority of the mandatory grants, from £64.9m, was focused on high street businesses. - A further £2.4m financial support package with deferral, discounted or foregone commercial fees, e.g. business car parking, licensing, refuse collection provided by the council as commercial landlord. - Promoted fast track, discounted pavement licence. **Shop Safe & Shop Local Campaign** [as outlined above] **Engagement –** business visits during re-opening, headcount and high street surveys
Next steps	**Next 6 to 12 months.**

	In addition to the above, this may include:
	
	Practical Business Engagement, Communications & Support:
	- Developing and delivering tailored business support for:
	  - Established business – financial accounting, marketing, adapting their offering – advice, training and grants
	  - Early stage start-up – advice, test trading grants, and sector-specific FAQs
	  - “Fit to Supply” support and “Meet the Buyer” Event - offering small to mid-sized businesses the chance to bid for public sector contracts.
	  - Opening safely guidance & Women Safety Charter
	  - London Borough of Culture, 2022 programme – tailored support for businesses to benefit from and contribute to the programme of activities
	- Negotiating meanwhile use with landlords in vacant spaces on Lewisham’s high streets to maximise the impact of the London Borough of Culture, 2022 and Lewisham’s Creative Enterprise Zone.
	- Signpost to partners’ resources, e.g. such as Goldsmiths’ NX Hub https://www.gold.ac.uk/nxhub/, or SHAPES Lewisham https://www.shapeslewisham.co.uk/shop/
	- Campaigns around High Street Survey and Shop Safe & Shop Local promoting local businesses in the borough, Mayor’s Business Awards, Evening & Night Time Economy, Small Business Saturday, Christmas.

Longer term measures	**Next 1-3 years.** In addition to the above, this may include: **Future Lewisham -**part of the Economic Recovery & Renewal Plan: support the Visitor Economy: - Events and markets - Evening and night time actions plans - Cultural “attractions” map
Increase footfall levels in high streets	
Concerns	Current footfall levels *perceived* to be relatively low by the businesses, and comes primarily from competition of attracting visitors between high streets. Environmental improvements, particularly in cleaning, lighting, green spaces, and security.
LSBU recommendations	**Environmental improvements**, particularly in cleaning, lighting, green spaces, and security were called for by businesses and consumers alike. **Individual high street marketing strategies** could then confidently be undertaken to identify distinct positioning for each high street but based on its existing offer/character. **Extend visitor catchments on each high street,** preferably attracting visitors from beyond the borough, taking advantage of the existing good transport connections. The high streets are well connected. Objectives for each location should be focussed on increasing: - Footfall densities, by attracting new visitors to each high street - Businesses visited regularly

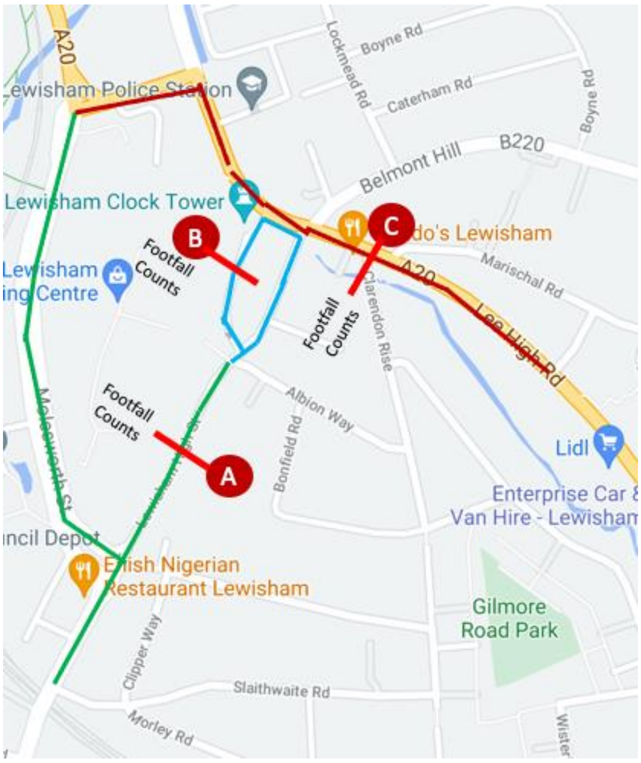
	- Increase the share of overall consumer spend
Measures already taken by the Council	**Commissioned High Street Survey** - Made over fifty hours of footfall observations across thirteen locations. **Public Highway –**Encouraged businesses to take-up pavement licensing application (fast track and accessible service) and potentially public highways spaces, e.g. parking bays. **Shop Safe, Shop Local** – Included free campaign tote bags for businesses and shoppers which provided very positive engagement between the Council and high street businesses, and the businesses with their consumers. **Support for permanent market traders** with grants worth over 6 months pitch fees from the Additional Restriction Grants.
Next steps	**Next 6 to 12 months.** In addition to the above, this may include: **Practical Business Engagement, Communications & Support.** - Public Highways' Local Implementation Plan TFL funding to help with transport & public realm strategy with the Welcome Back Grant to support the creation of attractive and welcoming public spaces: • Renovating street –scene &/or furniture • Walking highway • Cycling lanes & parking spaces - High Street Action Plans to help to promote their distinct offering to and attract visitors to the high streets - Support promotion to residents of their offers to attract remote-working residents and employees - Track spend via GLA High Street Data Service
Longer term measures	**Next 1-3 years.** In addition to the above, this may include: **Future Lewisham -** the Economic Recovery & Renewal Plan will support the increase in footfall via: - Catford public sector hub - Lewisham Central's High Street for All Challenge partnership - Lewisham market improvements support for the Visitor Economy: - Diverse evening and night time economy offer - Riverside attractions - Expand offer of culture, community, workspace
Vacancy rates are similar in Lewisham to elsewhere Are not currently high in relation to London-wide or national levels.	
Concerns	Gaps in the high streets reduce attractiveness, and ultimately the impression of vitality.
LSBU recommendations	A longer term view may be to encourage innovation and entrepreneurial motivation in the community, perhaps establishing a pop-up programme to trial new retail formats and offers in different vacant locations. In clusters, perhaps viewed as business incubators, these might bring

	footfall-driving benefits for each high street adding to the variety on offer.
Measures already taken by the Council	- Majority of the mandatory grants, of £64.9m, was focused on high street businesses. - Supported the business rates relief and the moratorium on evictions - Commissioned High Street (observed) vacant unit count as part of the High Street Headcount and Survey. - Start-up in Lewisham Libraries support - pipeline for start-ups seeking new retail spaces. - Business, character and community-driven planning policies in draft local plan under consultation.
Next steps	**Next 6 to 12 months.** In addition to the above, this may include: **Practical Business Engagement, Communications & Support:** - Looking to introduce article 4 direction with London Councils and Greater London Authority support. - Pilot meanwhile uses with business support for established and start-ups in vacant units, linked to High Streets' Action Plans, London Borough of Culture 2022, Creative Enterprise Zone and High Street for All Challenge. **Resources:** - Use of GLA High Street Data Service to capture footfall trends - Use of Additional Restriction Grant and the Welcome Back Fund to deliver business support, engagement and high street's study. - Work in partnerships to leverage existing programmes to maximise support to high streets and local supply chains.
Longer term measures	**Next 1-3 years.** In addition to the above, this may include: **Future Lewisham:** Implementing character and community-driven planning policies in: - Catford Master Plan - Adopt the Local Plan - Lee Green Development Plan - Adopted New Cross Area Framework and Station Opportunity Study / SPD - Sydenham Opportunity Study As part of the Economic Recovery & Renewal Plan: o Growth sector strategies o Expand offer of culture, community, workspace
Diversity of the high street offer	
Concerns	Multiple brand names can attract footfall, but they also stifle competition with local independent businesses in the same sector.
LSBU recommendations	Support the local high streets to retain and attract independent businesses, and to diversify beyond a retail offer to include other uses such as hospitality, cultural and community uses so that they are attractive places to visit and spend time.
Measures already taken by the Council	**Support for independent businesses with:** - Majority of the mandatory grants, of £64.9m, was focused on high street businesses.

	- Commissioned High Street survey and head count. - Support the business rates relief and the moratorium on evictions - Start-up in Lewisham Libraries support - pipeline for start-ups seeking new retail spaces. - Business, character and community-driven planning policies in draft local plan
Next steps	**Next 6 to 12 months.** Same action under vacancy rates.
Longer term measures	**Next 1-3 years.** Same action under vacancy rates.

Appendix 1. Location Maps

Lewisham Town Centre



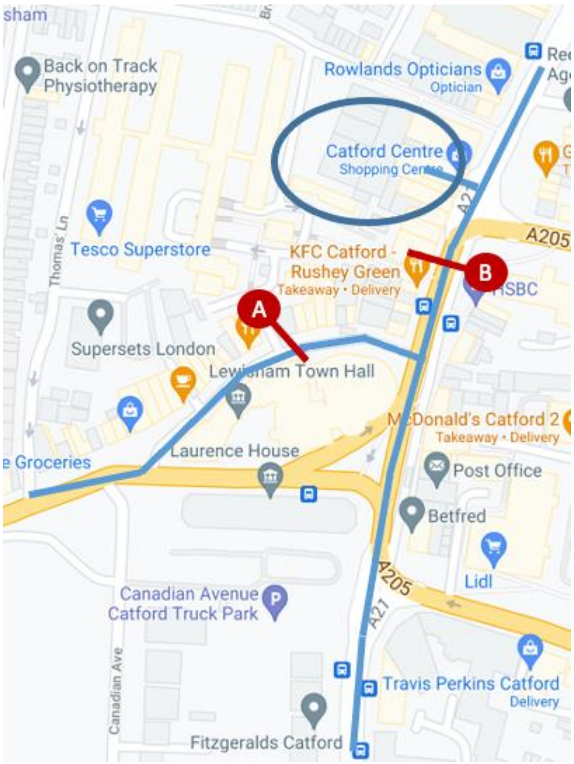
Data collected from Thursday May 6th to Saturday May 8th

On both sides of each street in an extended area to include Lee High Road to the far end of Mareschal Road.

.Footfall collected at three locations on both sides at:

A. Lewisham High Street (by *Primark*)
B. The Market (by *Lloyds Bank and*
C. Lee High Road (by Clarendon Rise)

Catford Town Centre



Data collected Tuesday May 4th, Wednesday May 5th, and Saturday May 8th

From Thomas Lane around Catford Broadway to Rushey Green.
Both sides of Rushey Green from Mekan Restaurant to Ringstead Road.
The Catford Centre.

Footfall counts on The Broadway (A) and Rushey Green (B)

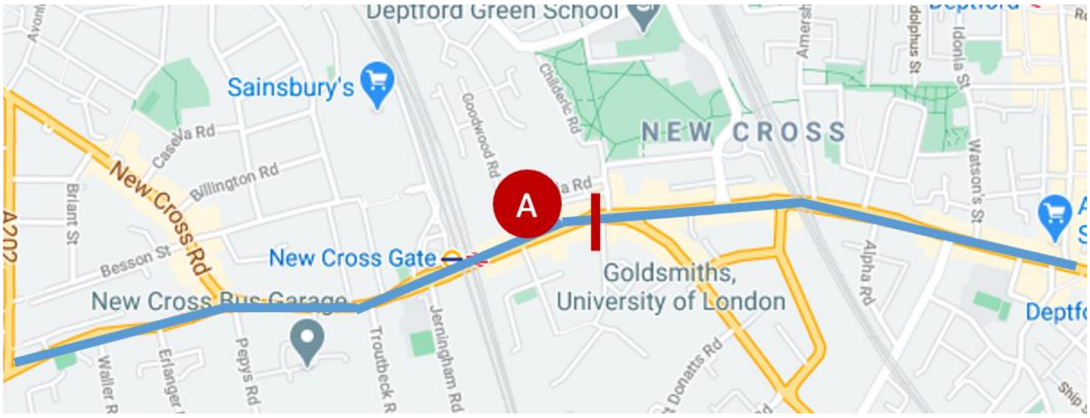
Deptford High Street

Data collected Saturday 24th, Monday 26th and Tuesday 27th April

On both sides of Deptford High Street from New Cross Road to Creek Road (A200)

Footfall counts made at (A), at the crossroads of Deptford High Street and Giffin Street on both pavements (and including the foot traffic on the road).

New Cross Road

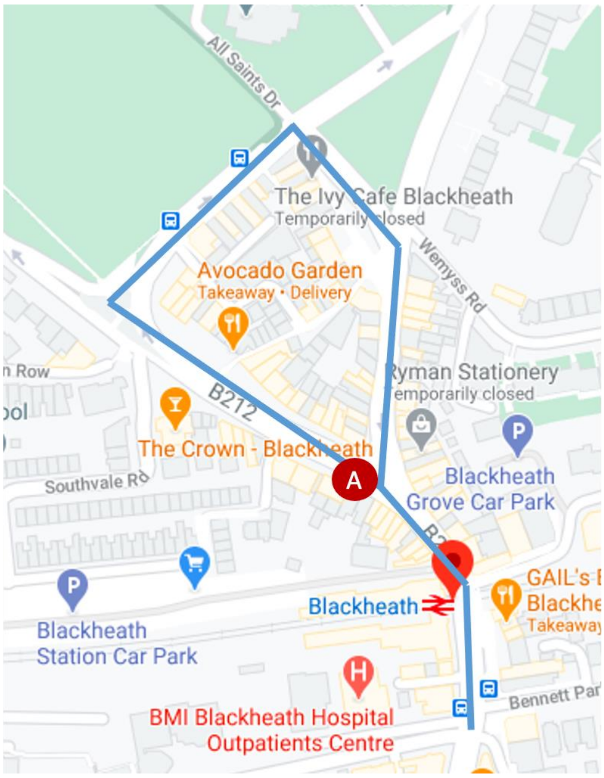


Data collected Saturday 24th, Monday 26th and Tuesday 27th April.

On both sides of New Cross Road between Kender Street and Deptford High Street, (businesses are largely centred between Troutbeck Road/Hart's Lane & Deptford)

Footfall counts made at (A), between the New Cross Hostel and Laurie Grove.

Blackheath



Data collected Wednesday 28th, Thursday 29th, and Saturday May 1st

From Bennett Park on both sides of each road around Lee Road, Blackheath Village, Tranquil Vale, Royal Parade, Montpelier Vale, and back to Lee Road.

Footfall counts made at (A), on both pavements of Tranquil Vale, between *Felicity Lord* and *John Payne.*

Lee Green

Data collected Wednesday April 28th

Around the Leegate Centre.

Footfall counts made at (A), on Eltham Road

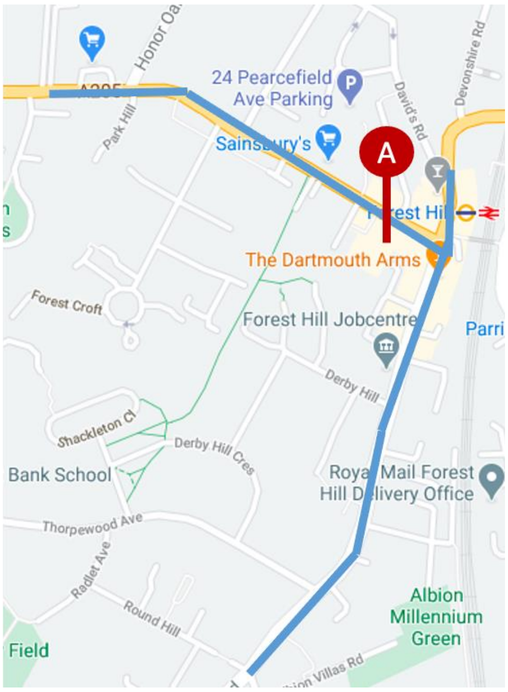
Sydenham

Data collected Wednesday 28th Thursday 29th and Saturday May 1st

On Sydenham Road between the Junction of Sydenham Road & Kirkdale, and the junction of Kenthouse Road at the bottom of the hill.

Footfall counts made at (A), on both pavements between the Sydenham Centre and Queensthorpe Road.

Forest Hill

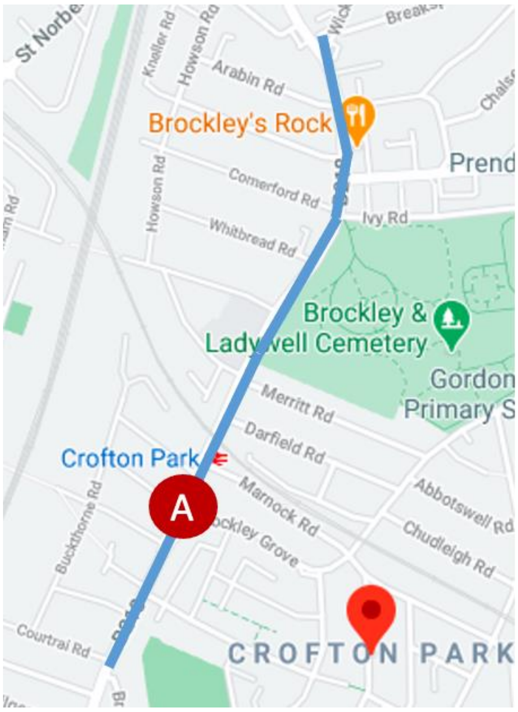


Data collected Friday 30th April and Saturday 1st May

On both sides Dartmouth Road (businesses as far as Derby Hill), Devonshire Road (as far as Waldram Crescent), London Road (as far as Eliot Bank and the Horniman Museum) and Station Parade. Businesses are more centrally located around the junction.

Footfall counts made at (A), on London Road between *Superdrug* and *Winkworth.*

Crofton Park

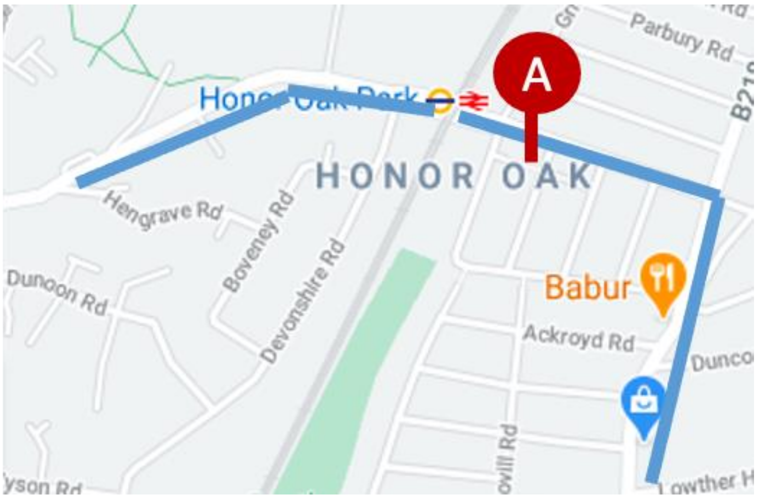


Data collected Friday 30th April and Saturday 1st May.

On both sides of Brockley Road from Brockley Rise/Courtrai Road as far as the junction with Wickham Road. This is essentially two centres on each side of the cemetery but was treated as one location in this study.

Footfall counts made at (A), on Brockley Rise at the junction of Marnock Road, on both pavements.

Honor Oak Park



Data collected Friday 30th April and Saturday 1st May.

On both sides of Honor Oak Park from Hengrave Road to Brockley Road, and from that junction as far as Lowther Hill.

Footfall counts made at (A), on both pavements between Grierson Road and Ballina Street.

Appendix 2. Business Survey Data

List of Tables

Appendix 2. Business Survey Data

The following tables contain descriptive data from the survey of business owners in the ten Lewisham High Streets. Some tables have been split to show the distribution of BAME and non-BAME responses for comparison where there were considerable differences, otherwise they give the responses to the main questions asked.

Table 1. Independent Business Owners Interviewed

Blackheath	14
Catford	38
Crofton Park	17
Deptford	54
Forest Hill	29
Honor Oak	16
Lee Green	2
Lewisham	53
New Cross Road	33
Sydenham	23

Of which:
86 are non-BAME (31%)
191 are BAME (68%)

Table 2. Business Longevity

Q3. How many years have you been trading at this location?

	TOTAL	%	BAME	%
Less than a year	27	10	20	10
1 - 3	66	24	46	24
3 - 5	54	19	43	**23**
Over 5	132	47	81	**42**
	279		**190**	

Over two fifths of independent traders are over five years on site.
Although 3+ years in business is equally distributed, BAME – owned businesses are likely to be a little more recently established.

Table 3. Employment

Q5. How many people do you employ here at the moment?

	TOTAL	%
1 - 3	177	63
4 - 6	67	24
6+	35	13
	279	

In the UK in 2020, 35% of retail businesses employed between 1 and 9 people, compared with 19% in the economy; 59% were one-person retailers. Although not directly comparable, Lewisham's independent traders do not seem out of line even after the lockdown.
Source: https://www.gov.uk/government/statistics/business-population-estimates-2020

Table 4. Retained employees during lockdown

Q6. Did you retain the same number throughout last year?

		%
Yes, and they each got the same or more working hours	76	**27**
Yes, but they got fewer working hours	75	**27**
Some staff were furloughed, but are back now or will be soon	52	19
Some staff were let go permanently	37	13
Other	28	10
Prefer not to say	11	4

Over half of independent retailers were able to keep their staff on the payroll.

Table 5. Business confidence: employment

Q7. Are you considering hiring people?

	Total		Non-BAME		BAME	
		%		%		%
In the next 3-6 months	57	20	29	**34**	28	**15**
In the next 6-12 months	25	9	4	5	21	11
Hard to estimate	73	26	19	22	53	28
No	124	44	34	40	89	**47**

BAME businesses are substantially less likely to employ more people imminently.

Table 6. Kickstarter and Apprenticeships

Q8.Would you consider using an apprenticeship or Kickstarter scheme?

	Total		Non-BAME		BAME	
		%		%		%
Yes, I already do	14	5	4	5	10	5
Yes, potentially	84	30	32	**37**	52	**27**
No, I don't think they are suitable/feasible	109	39	33	38	75	39
No, I don't know much about them	57	20	11	**13**	45	**24**

A low uptake of the schemes, but also rather lower consideration and knowledge among BAME businesses.

Table 7. Council Business Support Initiatives

Q21. Which of these council initiatives are you aware of and which have you used?

	Aware of:		**Used** (% of aware)**:**	
	BAME	*Non-BAME*	BAME	*Non-BAME*
	%	%	%	%
Restart Grants	**69**	73	**66**	59
Additional restriction grant	41	40	19	18
Trading Safely Web Pages	24	28	15	21
Pavement Licences	20	26	11	18
Business Awards	21	27	12	17
LLW business rates reduction	38	45	23	28
Average	**36**	**40**	**24**	**27**

On average non-BAME business owners are more likely to be aware of, and to have adopted, council support initiatives. Restart Grants are an exception however, with a slightly higher likelihood of both awareness and uptake among BAME-owned businesses. BAME business owners who were aware of the initiatives were over ***40% less likely*** to have used the Trading Safely web pages or the Business Awards.

Table 8. Perception of footfall density now

Q10. Now restrictions have been lifted for a couple of weeks, would you say this high street is:

	Total		Non-BAME		BAME	
		%		*%*		*%*
Less busy	194	*70*	49	*57*	143	*75*
As busy	39	*14*	14	*16*	25	*13*
Busier	39	*14*	23	*27*	16	*8*
No Response	7	*3*	-	-	7	*4*

High street business owners believe that trading conditions have not bounced back quickly, a majority across all high streets think that they remain worse than before. BAME business owners are even more pessimistic.

Table 9. Business confidence in the future

Q11. How optimistic are you that sales will return to pre-Covid levels?

	% of those who expressed an opinion (n = 250)					
	Total		Non-BAME		BAME	
		%		%		%
Not optimistic	22	*9*	4	*5*	18	*11*
2	44	*17*	12	*15*	30	*18*
3	90	*36*	22	*28*	68	*40*
4	61	*24*	25	*32*	36	*21*
Very optimistic	35	*14*	16	*20*	19	*11*

BAME owned businesses are rather less optimistic (32%) about the future than non-BAME owned (52%)

Table 10. Business Adaptations during lockdown periods

Q12. Did you adapt your business during lockdown?

		%
Yes	160	*57*
No	111	*40*
No response	8	*3*

Over half of the independent businesses interviewed made adaptations to remain trading

Table 11. Adoption and retention of business adaptations

Q.13 Which of these business adaptations did you make, which will you keep?

Adaptations	% adapting	% will keep
Started using delivery services	81	20
More outdoor space than before	72	16
Store layout for social distancing	63	51
Promoting on social media	31	27
Encouraged the use of contactless/card payments only	24	20
Started click and collect	22	17
Started mail/phone/email ordering	20	15
Started takeaway	17	16
Started my own delivery service	13	9
Opened longer hours	11	9
Other (please specify)	2	0
Average	32	18

A wide range of measures taken to adapt business models, the largest being delivery services. But for the most part these adaptations will not be retained (32% *vs* 18%) which suggest strongly that they are not profitable and/or do not generate incremental sales.

Table 12. Online sales

Q17. In the past week where have your sales come from mostly?

		%
Offline	210	*77*
About the same	37	*14*
Online	27	*10*

Unsurprisingly, three quarters of respondents thought that their turnover was mostly generated off-line, but a further quarter were selling the same, or more, **online.** For retailers on the high street this is likely incremental sales.

Table 13. Current Challenges

Q15. What is the biggest challenge facing your business going forward?

(Name one)	*%*
Lack of Footfall	*29*
Marketing : Awareness, Cost and Supplier, Staffing, Theft, Margins	*22*
Finance & Cash Flow	*16*
Covid related - a further lockdown	*11*
Sales and Consumer Confidence : restrictions on ability to trade	*9*
No Response	*8*
No Challenges	*6*
Competition	*5*

This list is compiled from responses to an open question: The biggest challenge identified is high street footfall density, followed by marketing issues, including consumer awareness and rising costs. 16% identified financial and cash flow challenges as most pressing.

Table14. What support is required?

Q16. What type of council support would help with this?
(Pick as many as apply)

	BAME	Non BAME
	%	*%*
Financial	*74*	*70*
Business Support Programmes	*35*	*33*
Access to Mentoring	*13*	*11*
Signposting to info	*21*	*20*
Other	*13*	*17*

There is no special requirement for BAME-owned businesses. Responses are distributed evenly across all business owners, and it is hardly surprising that a majority named financial support. In these responses, information signposting is considered important, picked by a fifth of all respondents.

Table 15. What environmental Improvements are needed?

Q18. Are there any public amenities or services that would make this high street a more attractive place for shoppers?

Improvement named (*n* = 250)	
	%
Free Parking	29
Environment: green spaces, cleaning, security	19
Direct interventions: business mix /planning & promotion	11
Public Toilets	10
Benches	9
Environment: traffic planning	9
Bank	8
Playgrounds	5
	100

Of those naming an improvement, the majority named free parking, but a fifth named a greener, cleaner more secure environment. One in ten called for traffic restrictions to slow or remove vehicles from the street completely. A range of conflicting ideas emerged (e.g., more spaces for bikes *vs* fewer bicycles. Free parking *vs* no cars) indicating probable difficulties in gaining consensus in some areas.

Appendix 3. Consumer Survey Data

List of Tables

Appendix 3. Consumer Survey Data

The following tables contain descriptive data from the street intercept survey conducted on ten Lewisham High Streets. The tables give an analysis of the total response on each question and then the comparison by High Street. Where there are considerable differences, these are highlighted.

Table 1. High Street Sample

Lewisham	98
New Cross	89
Forest Hill	89
Sydenham	88
Catford	70
Crofton Park	55
Blackheath	52
Deptford	46
Honor Oak	43
Lee Green	10

n = 640

Table 2. Frequency of visits

Q4. How often do you visit this high street?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Every day	**40**	**25**	40	45	30	45	44	**20**	44	42	40
2/3 times a week	**34**	35	34	31	41	31	35	40	32	30	39
At least once / month	**14**	23	14	7	22	11	9	0	12	19	10
Very occasionally	**12**	**17**	11	16	7	12	12	**40**	12	9	11

The people on Lewisham High Streets are frequent visitors. Two fifths visit daily, and three quarters visit several times per week. Blackheath (and Lee Green) are exceptions, with rather more occasional visitors.

Table 3. Visiting During Lockdown

Q2. During lockdown were you coming here:

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
More often	12	8	9	15	26	13	19	0	3	17	8
Less often	57	63	51	45	59	48	44	80	65	64	59
About the same	31	29	40	40	15	38	37	20	31	19	33

Over half of high street visitors said they had visited that high street less often during lockdown. Deptford, Honor Oak and New Cross had a slightly higher proportion who had visited *more* often.

Table 4. Catchment

Q6. Do you live or work locally?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Live locally	73	62	71	84	72	74	74	60	64	73	75
Work Locally	30	23	31	29	20	24	26	30	39	34	30
Live & Work	20	13	17	25	15	13	16	20	22	30	23
Neither	18	31	13	13	15	17	16	30	18	11	18

Over 70% lived locally

Table 5. Average Spend Today

Q10. By the time you leave here today, how much money do you expect to have spent?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Less than £10.00	**41**	33	40	42	39	37	44	60	40	47	43
£10- £30	**36**	46	34	44	37	37	35	30	27	36	34
£30-£50	**14**	15	16	13	11	16	14	0	16	10	16
£50-£100	**6**	4	6	2	7	8	7	0	9	4	5
£100+	**3**	2	4	0	7	2	0	10	8	2	2

In general, spend is low. Four in ten are looking to spend £10.00 or less and eight in ten under £30 on this visit. Spend in Blackheath skews slightly higher, Deptford and Lewisham are attracting the highest spenders.

Table 6. Reasons for the visit

Q11.What most attracts you to this High Street

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
It's convenient	**60**	46	**67**	60	41	67	58	50	66	52	**70**
The range of shops	**32**	35	31	24	33	**40**	14	10	39	38	23
The range of places to eat and drink	**16**	**25**	10	9	**26**	12	7	0	12	**34**	11
A specific shop/bar	**20**	13	**36**	11	4	27	23	0	13	16	**34**
A good place to meet friends	**14**	**27**	17	7	17	10	16	0	11	**26**	3

	Total										
Other	**21**	23	17	22	15	12	14	40	33	17	26

Although convenience is the biggest attraction across the board, there still seem to be specific and different reasons to visit each High Street. Blackheath and Deptford warrant special trips, Catford, Forest Hill & Sydenham are largely convenient – the range of shops there are ***not*** the attraction, although a higher proportion than average are there for a specific shop or bar. The range of shops is however a draw to Forest Hill, New Cross and Lewisham, while Deptford, Blackheath and New Cross are drawing visitors to bars and restaurants, and to meet up with friends. There was also a wide range of "Other" attractions named.

Table 7. Transport

Q12. How did you travel here today?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
On foot	**46**	35	44	51	50	**64**	49	30	23	52	52
Public Transport	**35**	27	**50**	31	37	20	19	50	**55**	35	28
Bicycle	**6**	4	1	**9**	**11**	**9**	**14**	0	3	6	3
Car	**11**	**25**	4	9	2	4	14	**20**	**18**	7	14
Taxi/Uber	**2**	10	0	0	0	2	5	0	0	1	1

Over 80% of visitors to Lewisham High Streets arrive on foot or by public transport. Lewisham and Blackheath are exceptional in having rather more visitors arriving by car, a quarter in Blackheath, and almost a fifth in Lewisham. Honor Oak and Deptford have a strong cycling contingent, Forest Hill has a high proportion on foot reflecting its high "convenience" score.

Table 8. Economic hardship

Q14.Thinking about the last six months have you or someone in your family or someone else you know personally lost their job as a result of the economic conditions?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Yes	**41**	44	49	44	**52**	42	**28**	10	40	38	38
No	**58**	56	51	55	**48**	58	**72**	90	60	62	55

	Total										
Prefer not to say	**1**	0	0	2	0	0	0	0	0	0	8

Two fifths of the high street visitors had personal experience of the economic consequences of the pandemic. This experience was fairly evenly distributed, but highest in Deptford and lowest in Honor Oak.

Table 9. Changing consumer behaviour: adoption

Q.17 Many shops and restaurants have introduced new services like click and collect and home delivery. During Lockdown did you start using?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Internet orders at supermarket	**52**	29	46	53	48	**64**	56	60	50	53	60
Home delivery/local shop	**29**	23	11	29	35	**40**	21	20	11	**45**	**39**
Click and collect/local shop	**23**	12	10	29	28	29	23	10	8	**37**	**33**
Home delivery/local restaurant	**40**	**48**	**54**	29	41	**58**	40	70	32	38	26
Home delivery/chain restaurant	**19**	33	21	13	**28**	24	**37**	0	12	10	10
Click and collect/ any restaurant	**11**	21	0	11	13	**17**	**26**	0	5	12	9
None of these	**22**	17	19	24	24	11	23	10	34	18	27

Almost a quarter of those on the high street did not take up online ordering and delivery during the Lockdowns. Home delivery from local shops was popular in Forest Hill, Sydenham, and New Cross, and from Local restaurants in Blackheath, Catford and Forest Hill. Restaurant click and collect was also more popular in Honor Oak and in Forest Hill.

Table 10. Changing consumer behaviour: persistence

Q20. Do you think you will carry on using the internet to shop in this way?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Yes - for big supermarkets	**40**	**12**	**31**	38	33	**56**	37	50	39	43	**53**
Yes for local shops	**16**	17	9	**24**	7	17	14	10	6	**27**	**23**

Yes for local restaurants	**30**	**37**	**46**	25	17	**42**	26	70	27	20	23
I'm not sure	**18**	29	17	24	15	11	23	0	19	11	20
No not as much	**23**	23	24	18	**46**	15	30	10	27	22	16

Forest Hill and Sydenham shoppers are now supermarket delivery fans. Local restaurant deliveries are now popular in Blackheath, Catford and Forest Hill, and deliveries from shops in New Cross Sydenham and also Forest Hill.

Table 11. Changing consumer behaviour: leisure & exercise

Q.19 During lockdown did you exercise or spend more time in any of the following spaces?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
High Streets	**27**	15	33	**49**	22	15	**37**	0	27	18	**36**
Shopping Centres	**10**	12	**21**	2	**22**	6	0	0	8	13	6
Parks	**69**	73	**84**	45	54	**89**	60	90	61	67	66
Walk/Cycle routes	**43**	35	40	27	33	**55**	49	40	51	**52**	36
Anywhere else?	**24**	10	19	42	11	24	12	30	38	16	31

Seven in ten respondents spent more time in Lewisham Parks than before, and over four in ten on the walking and cycle routes. A quarter spent more time outside on the high streets. The most common responses elicited from *Anywhere else?* We're exercising at home and shielding.

Table 12. Changing consumer behaviour: new habits

Q20. Do you think you will carry on with this now?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Yes	69	63	63	73	52	67	**77**	50	66	**80**	**76**
Maybe	23	25	34	16	35	33	16	30	22	12	15
No	5	8	1	7	**13**	0	5	10	6	8	5
Prefer not to say	3	12	1	4	0	0	2	10	5	0	5

Seven in ten also considered that they would carry on with the habits they had taken up. A further quarter were rather more non-committal.

Table 13. Is this High Street an inviting place to spend time outside?

Q21. **Compared with others, is this high street an inviting place to spend time outside?**

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
For a meal	**33**	37	29	56	30	22	40	20	40	27	32
For a coffee	**42**	48	29	56	28	52	47	20	33	42	49
With takeaway coffee	**21**	23	31	22	9	19	40	0	19	11	26
At a bar or pub	**20**	40	23	31	17	13	33	0	6	21	16
Browsing w/ friends	**33**	33	26	42	41	29	35	10	34	33	32
No	**26**	10	23	22	15	21	23	70	42	36	20

Over a quarter of all respondents gave a negative response to this question, and strongly negative in Lewisham and in New Cross. Crofton Park was popular for coffee or a meal, and Blackheath for a drink. Crofton Park and Deptford both scored as places to browse.

Table14. Consumer confidence

Q23. **Looking ahead six months from now, and thinking about your financial situation do you expect you will be feeling:**

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Much better off	**8**	13	4	2	11	16	2	0	4	13	7
Better Off	**25**	17	23	24	15	22	26	30	24	38	25
About the same	**60**	65	67	64	61	55	67	70	63	44	63
Somewhat worse off	**5**	2	4	5	7	4	2	0	7	4	6

Much worse off	**1**	0	0	0	7	1	0	0	0	0	0
Prefer not to say	**1**	4	0	5	0	1	2	0	1	0	0

A majority of respondents (60%) believed they would be financially about the same in six months' time. A quarter believed they would be better off, and a further 8% thought they would be much better off. Confidence is skewed quite positively.

Table 15. The purpose of the visit

Q8. What is the main purpose of your visit here today?

	Total	Blackheath	Catford	Crofton Park	Deptford	Forest Hill	Honor Oak	Lee Green	Lewisham	New Cross	Sydenham
	%										
Shopping	**34**	11	46	36	43	34	28	30	48	29	34
Socialising Eat/Drink	**21**	41	14	18	26	25	26	10	11	31	8
Travelling/Exercising	**30**	28	27	27	13	34	30	60	33	26	23
Life Administration	**11**	20	13	13	13	6	16	0	4	13	17

Only a third of the respondents said that the main purpose of their visit was shopping. Another third (30%) were passing through or exercising, and one in five was on the high street for leisure. The pattern is somewhat skewed by high street: Catford Deptford and Lewisham had substantially more shoppers, Blackheath more leisure visitors.

Blackheath, Sydenham, and Honor Oak had also drawn rather more people for miscellaneous visits to Post Offices and banks, solicitors, dentists, and doctors.

Table 16. Repeat Rates by High Street

Q13. What was the last high street or shopping centre you visited? (Name one)

	Repeat Visit	Other Lewisham	Total Lewisham
	%	%	%
Honor Oak	15	46	61
Catford	17	44	61
Deptford	31	29	60
Sydenham	8	37	45
Forest Hill	10	33	43
Blackheath	0	43	43
New Cross	8	32	40

Lewisham	21	18	39
Crofton Park	0	39	39
Average	**12**	**36**	**48**

The question identifies repeat visits. The average repeat is 12% but with higher rates at Lewisham, Deptford and Catford. 36% of previous visits were in other Lewisham high streets so the total repeat rate within the borough is 48%, but far higher in Honor Oak, Deptford and Catford. Higher rates imply more local and limited catchment, but also an opportunity to draw from other, wider areas. No one in Blackheath was on a repeat visit, and with the exception of Honor Oak, Catford and Deptford, over half of the visitors on any other high street were last on a high street *outside* the borough.

Table 17. Duplication of Visits

The proportion on high street *x* that last visited *y*

	%		%
Catford		**Lewisham**	
Lewisham	40	Lewisham	21
Catford	17	Westfield	15
Bromley	9	Bromley	12
Oxford street	6	Deptford	7
Deptford High Street	3	Catford	5
	74		60
New Cross Road		**Deptford**	
Lewisham	29	Deptford	31
Deptford	12	New Cross	18
Peckham	9	Lewisham	11
New Cross Road	8	Westfield Stratford	9
West End	7	Brent Cross	7
	65		76
Sydenham		**Crofton Park**	
Catford	21	Lewisham	23
Lewisham	10	West End	13
Crystal Palace	9	Brockley	6
Sydenham	8	Catford	6
Bromley	6	Bromley	6
	54		54
Forest Hill		**Honor Oak**	
Sydenham	13	Honor Oak	15
Forest hill	10	Lewisham	10
Catford	7	Catford	10

Lewisham	7	New Cross	7
West End	7	Bromley	5
	43		46

Competition with other high streets is more or less concentrated at each location, even allowing for repeats. The biggest competitor for footfall is Lewisham Town Centre which draws an average of 20% from each other high street. The next biggest draw in Catford at 7% on average. The table shows the range of out-of-borough shopping locations visited by Lewisham shoppers.

Table 18. Proportion of visitors duplicated within Lewisham

% of the visitors in:	Also shopping in…									
	Lewisham	Catford	New Cross	Deptford	Forest Hill	Sydenham	Blackheath	Crofton Park	Honor Oak	Avg Dupe
Lewisham		5	3	7	2	1	0	0	0	**2**
Catford	**40**		0	3	3	0	0	0	0	**6**
New Cross	29	2		**12**	1	0	0	0	0	**6**
Deptford	11	0	**18**		0	0	0	0	0	**4**
Forest Hill	7	7	0	1		**13**	2	1	1	**4**
Sydenham	10	**21**	0	0	**3**		3	0	0	**5**
Blackheath	31	2	0	0	0	0		0	0	**4**
Crofton P.	23	6	2	2	6	0	0		**0**	**5**
Honor Oak	10	10	7	5	2	2	2	**5**		**5**
	20	**7**	**4**	**4**	**2**	**2**	**1**	**1**	**0**	**4**

Examining the duplication matrix derived from the last visit analysis the biggest centres are drawing the biggest proportion of Lewisham shoppers, and the smaller more local centres are drawing far lower proportions.

On average the duplicated proportion on any high street from any other is around 4%, but it is four times that in Lewisham and double in Catford.

There are exceptions that stand out: Catford shares a very high proportion of its shoppers with Lewisham; Sydenham shoppers favour Catford.

New Cross and Deptford share large proportions of visitors, probably because of their proximity. The same is true of Honor Oak and Crofton Park, but the relationship is skewed – Honor Oak shoppers visit Crofton Park, but not the other way around.

Table 19: Comparative Hourly Footfall Weekday & Weekends

AM counts between 11.00 and 12.00
PM counts between 3.00 and 4.00

WEEKDAY	am	pm
Lewisham Primark	1508	1572
Lewisham Market	1462	2070
Lee High Road	777	631
Sydenham	691	621
Deptford	589	520
Rushey Green	580	729
Blackheath	568	582
Forest Hill	514	740
New Cross	413	643
Catford Broadway	366	380
Crofton Park	285	318
Honor Oak	232	358
Lee Green	107	190

SATURDAY	am	pm
Deptford	1893	1460
Lewisham Market	1811	-
Lewisham Primark	1283	-
Forest Hill	809	705
Blackheath	711	877
Rushey Green	680	872
Lee High Road	655	-
Sydenham	650	558
New Cross	521	564
Honor Oak	413	329
Crofton Park	403	300
Catford Broadway	350	361
Lee Green		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