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2020-21

Review of High Street Footfall in England



**HIGH
STREETS
TASK
FORCE**

About the High Streets Task Force

The High Streets Task Force is an alliance of placemaking experts. Commissioned in 2019 by the Ministry of Housing, Communities and Local Government (now Department for Levelling Up, Housing and Communities), the Task Force provides the encouragement, tools, skills and training that communities and local government need to transform their high streets.

www.highstreetstaskforce.org.uk

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Foreword

Professor Cathy Parker
Research Lead, High Streets Task Force

Footfall is a simple indicator that tells us a lot about the nature of high streets, how they are used and how they are changing. It has been a key indicator of a town centre's vitality and viability since the publication of Planning Policy Guidance Note 6 Town Centres and Retail Development in 1993. From footfall data from Springboard, for around 180 high streets, we have been able to draw a number of conclusions about the annual performance of high streets, during the second year of Task Force operations (from July 2020 to June 2021).

As noted in last year's report, footfall was already falling – around 4% in five years (2016-2019) – reflecting a number of structural changes such as on-line shopping, decline of the multiples, and changes in consumer behaviour. Nevertheless, the slow decline of footfall before COVID seems almost insignificant when compared to the impact the pandemic has had on the number of visitors to England's high streets. This report begins to explore that impact, albeit with the limitation of working with chaotic data that reflects many factors, not least the 12 milestones relating to lockdowns and other restrictions noted in our COVID-19 timeline.

Despite the researchers' constant refrain of needing more data, we can draw many useful conclusions from the analysis, which point the way to how high streets will need to adapt in future. Firstly there is the reassuring sign of the impact of COVID-19 vaccines on the pace and trajectory of footfall recovery in late 2020. As we look into the future, we should not be complacent about public health and its crucial role in ensuring people feel safe in public spaces.

We can say with confidence that small, local high streets have recovered quickest, and that towns with a defined sense of place and role beyond template retail have shown greater resilience. Cities, especially those that attract a high number of national or international visitors, are on a longer recovery trajectory. Even before the pandemic we were making the case for a diverse, multifunctional and unique offer on high streets, and now this must be the active goal for many more towns, particularly those that are planning the investment of government funding. We have observed in this study that a high number of archetypal retail towns have shifted to new multifunctional and speciality models, and it's vital that local place makers understand what type of town they are working in, and what type of change in footfall patterns they want to encourage.

It is significant for understanding the evolution of high streets at a local, regional and national level that, despite the importance and value of the indicator, the majority of high streets across England still do not monitor footfall. The High Streets Task Force encourages all local authorities, community groups and place management organisations to engage in footfall analysis, whether that's through estimated data that the Task Force can provide, manual counting, or automatic counting technology. There are some excellent case studies in this report of places doing just that.

Whilst reports like these are useful in establishing general trends, all high streets are different and so local knowledge and analysis is crucial for local decision making. I look forward to working with places across England, in my role with the High Streets Task Force, to continue help them understand how people are using their high streets.

1. Vaccines encourage footfall recovery as long-term picture unclear

COVID-19 fundamentally changed high street footfall. To give a sense of the size of this change during 2020, 10 million fewer people visited each of England's regional cities (on average). A stronger footfall rebound in 2021 compared with 2020 reflects the impact of the vaccination programme alongside the end of restrictions. The Christmas period will be key to establishing if people are returning to many high streets (those with a strong retail offer) in the numbers comparable to 2019.

2. District centres recover quickly but cities take longer

44% of towns had recovered their pre-pandemic footfall profile in Summer 2020, compared to 48% with a reduced footfall profile, 5.1% much reduced, and 2.9% exhibiting a summer boost.

The likelihood of footfall recovery is strongly associated with the size of a settlement. 100% of district centre high streets recovered footfall volumes in summer 2020, with the majority of major cities still much reduced at this time.

3. Reliance on retail slowed high streets' recovery

Towns with a varied high street offer and unique attractions have fared better than those defined mostly by retail. Over 67% of 'Speciality' towns - those which serve their local population but which also attract tourists and daytrippers - had recovered footfall over summer 2020. However, no Comparison retail towns had achieved a similar recovery during this period. Holiday towns were the best performing during this period, with nearly 50% actually beating pre-pandemic footfall forecasts.

4. Trend shows shift from retail to multifunctional high streets

Between 2016 and 2019, the number of *Comparison* retail towns fell by over 60%. Of these towns that changed their role or defining function, 55% shifted to a *Multifunctional* signature, with 45% becoming *Speciality*. By comparison, the number of *Speciality* towns in our sample has grown from 36 to 53. Breaking this down further, 9 *Comparison* towns and 11 *Multifunctional* towns became Speciality Towns in this period. This may reflect current investment in culture and heritage-led regeneration and how this is impacting on the form and function of those towns.

5. Footfall shifts from night-time to day-time economy

It's clear that the night-time economy in our towns and cities has suffered more, proportionally, than the daytime economy throughout the pandemic. COVID-19 has caused a 6% shift in footfall away from the night-time economy and towards the daytime economy. Place leaders and managers may have to work hard to encourage some people back to the evening/night-time economy.

Pandemic timeline

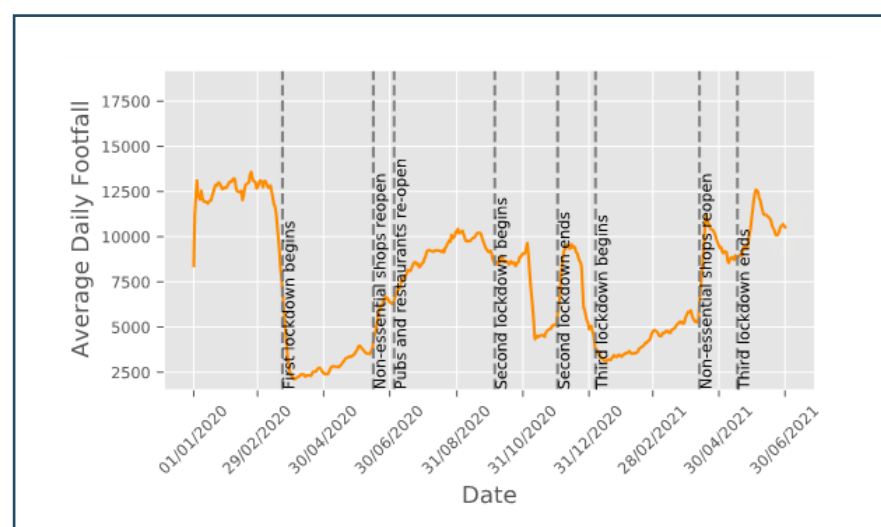
Since the imposition of the first lockdown on 23rd March 2020, England has experienced many changes to the levels of COVID restrictions, increasing or decreasing them to align with the government's latest assessment of risk to the community at large and the NHS in particular.

Table i summarises key dates that are likely to have influenced footfall levels in English towns and cities. The dates in this table have been sourced from two government publications . However, we have selected only those dates that we consider to be having a major influence, and many more dates and details can be found in the above cited publications.

Table i: Key dates of COVID restrictions in England

	Date	Action
2020	23 Mar	First lockdown begins
	15 Jun	Non-essential shops re-open
	4 Jul	Pubs, restaurants, hairdressers and some leisure facilities re-open with social distancing
	3 Aug	Eat Out to Help Out scheme begins
	14 Aug	Further easing of lockdown: theatres, bowling alleys and soft play open with restrictions
	22 Sept	Return to working at home and 10pm curfew on hospitality
	14 Oct	New three-tier system of restrictions starts
	5 Nov	Second lockdown begins
	2 Dec	Second lockdown ends and England returns to a stricter three-tier system
2021	6 Jan	Third lockdown begins
	12 Apr	Non-essential shops re-open. Outdoor venues including pubs, restaurants, zoos and theme parks re-open as do some tourist indoor leisure facilities such as gyms.
	17 May	Third lockdown ends and England returns to a stricter three-tier system.

Figure ii: Key dates of COVID restrictions in England and average daily high street footfall



1 - Vaccines encourage footfall recovery as long-term picture unclear

High street footfall in England had been steadily dropping before the pandemic, down by just under 4% between 2015 and 2019, and during this time similar month-by-month patterns were observed.

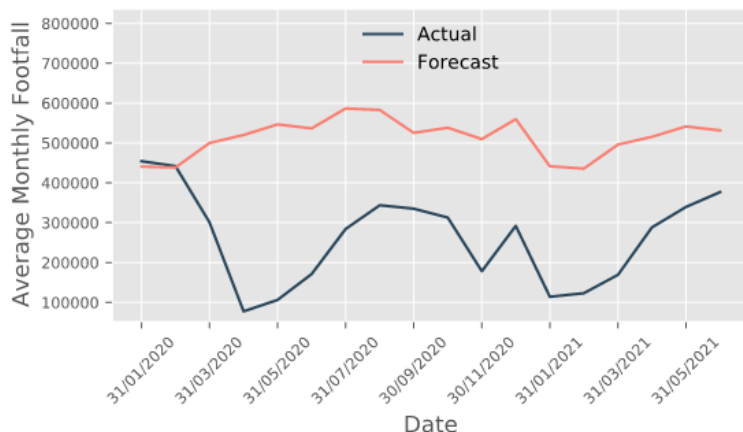
COVID-19 fundamentally changed high street footfall. The commonly applied forecasting methods based on several past years of data are no longer appropriate. Figure A shows how footfall from March 2020 to September 2021 has consistently tracked below previously forecast levels, by as much as 90% at times. To give a sense of the size of this change during 2020, a typical English regional city will have had approximately 10 million fewer people on its streets.

However we can observe that, with the pandemic's restrictions lifted, there was a significant bounce-back in the number of people visiting high streets.

In fact, footfall has recovered at greater speed since the reopening of non-essential retail on 12 April 2021 (+112.9% in the first week) than after the previous reopening of non-essential retail on 15 June 2020 (+62.9%). This stronger rebound in 2021 is likely to reflect the impact of the vaccination programme alongside the end of restrictions.

There is encouragement too in the upward trajectory of current average monthly footfall levels, which are tracking slowly towards the traditional, pre-pandemic forecast for 2021. The Christmas period will be key to establishing if, after COVID-19, people are returning to high streets in the same numbers.

Figure iii (below): Comparison between avg. footfall in England with a pre-COVID forecast based on 5 years' monthly data



To give a sense of the size of this change during 2020, a typical English regional city will have had approximately 10 million fewer people on its streets.

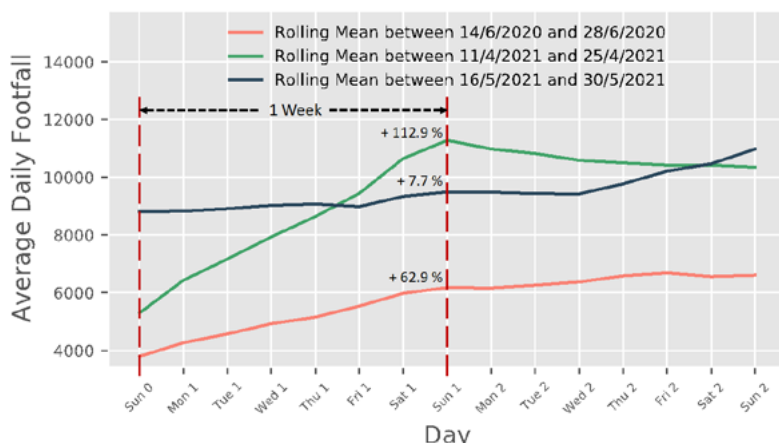


Figure iv (left): Change in avg. daily footfall for 402 locations in England in the two weeks following the easing of various COVID restrictions.

15/6/2020 = re-opening of non-essential retail after lockdown 1; 12/4/2021 = re-opening of non-essential retail after lockdown 3; 17/5/2021 = re-opening of hospitality and easing of other COVID measures. The curves are 7-day rolling averages, and percentage changes have been computed for the first week following easing of restrictions

2 - District centres recover quickly but cities take longer

The effect of COVID-19 on towns, cities and high streets throughout the UK has clearly been profound. However, it is clear from our investigations that some places have been hit harder than others.

Study of monthly footfall data from 175 English towns and cities in 2020 reveals four regular patterns relating to the extent of footfall recovery observed during the summer months of 2020. These are termed: *Recovered*, *Reduced*, *Much Reduced*, and *Summer Boost* (significant footfall in August and late September, compared to other months). Using this approach, we can see that 44% of towns had *recovered* in Summer 2020, compared to 48% with *reduced* footfall, 5.1% *much reduced*, and 2.9% exhibiting a *summer boost*.

Analysing the data further shows that the likelihood of footfall recovery is strongly associated with the size of a town, as defined by the High Streets Task Force's activity hierarchy. As we can see, small and local centres recovered faster than larger towns and cities. This is most starkly illustrated in 100% of district centre high streets displaying a *recovered* footfall signature.

The period covered by these findings was a brief one with relatively few restrictions following the easing of the first COVID lockdown, although three months before the announcement of the vaccine rollout in England. People's behaviour and mobility in towns and cities will inevitably change as we move further away from the height of the pandemic (in terms of mortality rate) however this data is still highly relevant in showing the impacts based on size of town and how this might affect future resilience and transformation strategies.

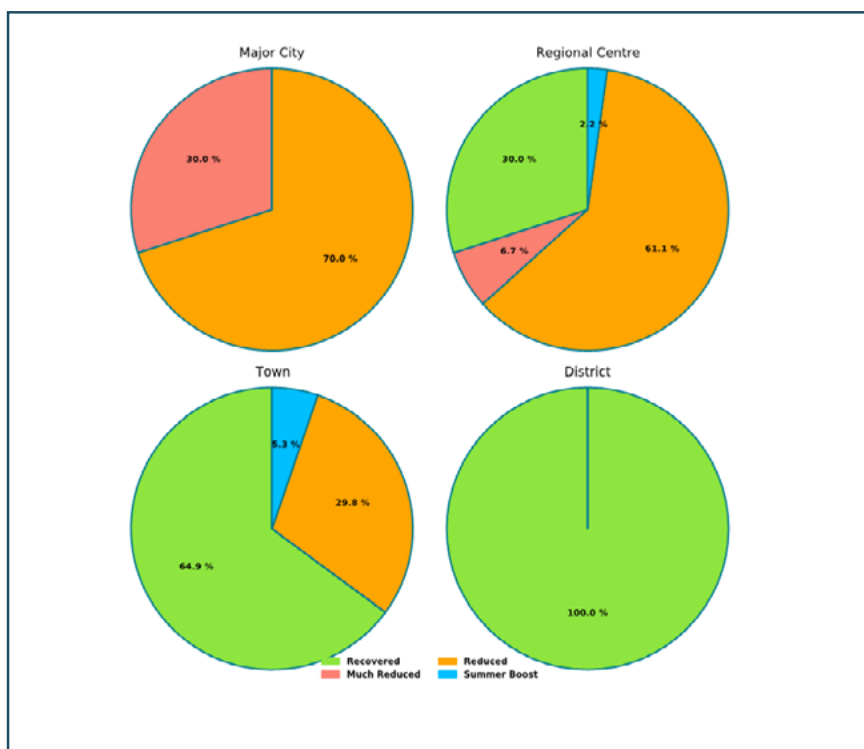
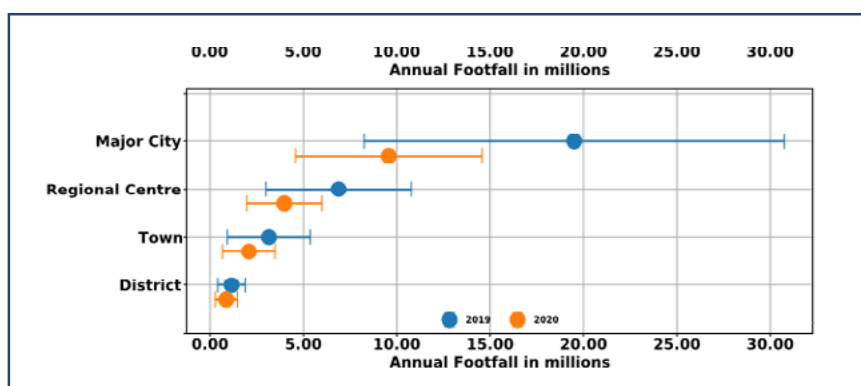


Figure v (left): How the 2020 classification of town recovery fit the town activity hierarchy

Figure vi (right): Annual footfall for UK towns and cities in 2019 and 2020 (Springboard) showing means (circles) and standard deviation ranges (error bars) for the town activity hierarchy



3 - Reliance on retail slowed high streets' recovery

Analysis by the High Streets Task Force shows that towns with a varied high street offer and unique attractions have fared better than those defined mostly by retail.

Holiday and *Speciality* towns recovered at a faster rate than *Comparison* towns during the late summer period of 2020. *Speciality* towns are defined as those which serve their local population but which also attract tourists and as a result are busiest in summer and in December.

Our analysis shows that over 67% of *Speciality* towns had recovered footfall over summer 2020. However, no *Comparison* retail towns had achieved a similar recovery during this period. This disparity is perhaps not surprising as people went in search of green space or trips out to attractions that could be enjoyed in the open air.

The best performing of the four town types was *Holiday* town, with every one recovering their pre-pandemic footfall and 45% of those towns actually outperforming 2019 as people explored domestic locations for their annual break.

“Our analysis shows that over 67% of *Speciality* towns had recovered footfall over summer 2020. However, no *Comparison* retail towns had achieved a similar recovery during this period.”

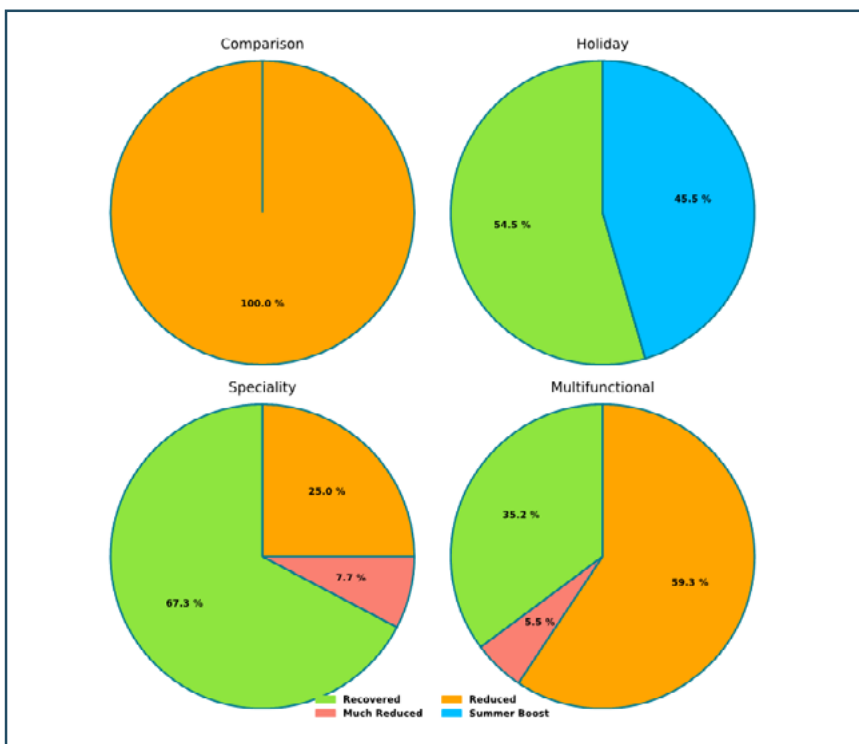


Figure vii: How the 2020 classification of town recovery fit the identified town types

4 - Trend shows shift from retail to multifunctional high streets

As we've all observed throughout the pandemic, high streets, towns and cities are constantly changing. This has happened throughout history and Task Force research shows that today's towns are changing what they offer to visitors and residents, which has a corresponding on their footfall patterns.

We can observe how towns change their footfall patterns by taking the High Streets Task Force categorisation of towns: *Comparison* (retail), *Multifunctional*, *Speciality*, and *Holiday*.

Examining how individual towns change their classification reveals a rather complex picture, but do show a shift away from *Comparison* retail to models that attract visitors more consistently across the week and year.

Between 2016 and 2019, the number of *Comparison* retail towns fell by over 60%. Of these towns that changed their role or defining function, 55% shifted to a *Multifunctional* signature, with 45% becoming *Speciality*.

By comparison, the number of *Speciality* towns in our sample has grown from 36 to 53. Breaking this down further, 9 *Comparison* towns and 11 *Multifunctional* towns became *Speciality* Towns in this period. This may reflect the current investment in culture and heritage-led regeneration.

From 2016 to 2019 the number of *Multifunctional* towns increased from 64 to 65, or an increase of 2%. However, there was a lot of 'churn' in this class.

It is possible that there are two types of *Multifunctional* towns. The first type are truly multifunctional and will maintain this signature over time because they are centres for shopping, employment, culture etc. that meet their needs of their catchment (large or small). The second type could be thought of merely ex-*Comparison* or ex-*Speciality* Towns. They have a flat profile just because they are no longer serving those previous functions, and not because they are successful multifunctional centres. We will investigate this further when we conduct a review of annual signatures in 2021 when a full year of undisrupted data is available.

Table viii: Changes in town type classification for UK towns between 2014-16 and 2017-2019

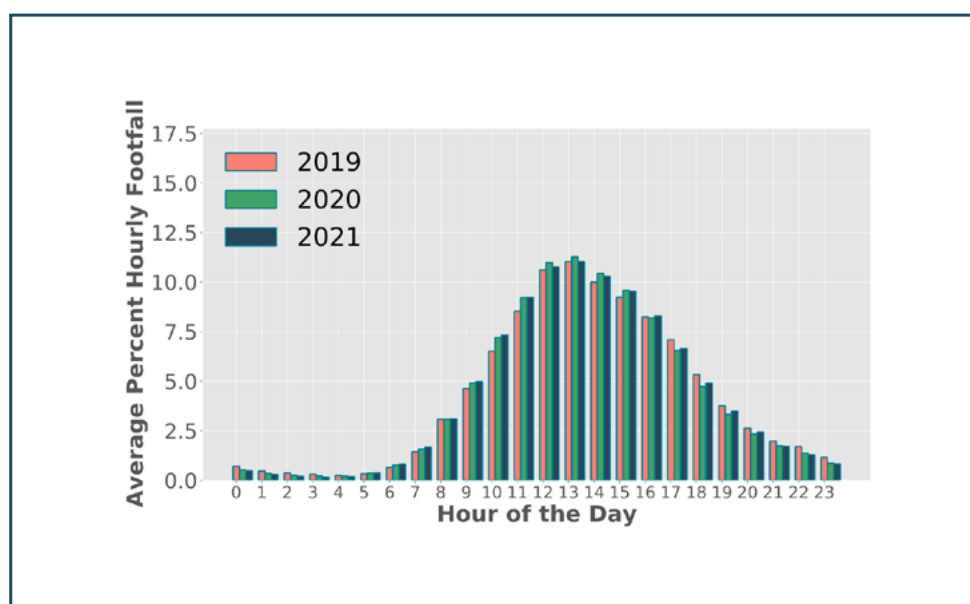
2014-2016		2017-2019			
Annual signature	No. of towns	Comparison towns	Holiday towns	Speciality towns	Multifunctional towns
Comparison	32	12	0	9	11
Holiday	12	0	12	1	0
Speciality	36	0	2	32	2
Multifunctional	64	1	0	11	52

5 - Footfall shifts from night-time to day-time economy

It's clear that the night-time economy in our towns and cities has suffered more, proportionally, than the daytime economy throughout the pandemic. This is because hospitality, and especially nightclubs, have been closed down longer than non-essential retail (which is open in the daytime). Many festivals and night-time events that would normally animate our high streets at night and drive night-time footfall have also been cancelled.

The graph below shows the spread of footfall through the hours of the day from 2019-21 (in percentage terms). These are not absolute footfall volumes, instead the graph shows the allocation of footfall across the hours of the day, which allows us to compare years more easily. Defining the daytime economy between 6 am and 6pm, it accounts for 80.7 %, 83.5 %, and 86.5 % of daily footfall for 2019, 2020, and 2021, respectively. COVID-19 has caused a 6% shift in footfall away from the night-time economy and towards the daytime economy. Place leaders and managers may have to work hard to encourage some people back to the evening/night-time economy.

Figure xi: Average hourly footfall for 415 locations in 168 English towns and cities. Comparing 2019, 2020, and 2021.



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2 Introduction

The High Streets Task Force was commissioned by the Ministry of Housing, Communities and Local Government (now Department for Levelling Up, Housing and Communities) in 2019 to help place leaders reinvent their high streets. The Task Force was set up before the start of the COVID pandemic to provide a national programme of data, training and expert advice to a range of town and city centre stakeholders. However, since COVID-19, the role of the High Streets Task Force has become even more crucial, and it is now supporting hundreds of local authorities, businesses and members of the wider community to recover from the impact the pandemic has had on town centres and high streets.

To support both the recovery and longer-term reinvention of the High Street, the Institute of Place Management, the lead Partner of the High Streets Task Force, has identified footfall as the most important indicator through previous research and projects¹. Footfall is very responsive and can be used to measure the changes on the high street almost in 'real-time'. Furthermore, there is a close relationship between footfall and other important indicators such as spend, property/rental values, and occupancy rates. Footfall can be measured by automatic footfall counters, such as those provided by Springboard, the consortium partner of the High Streets Task Force responsible for providing footfall data. In addition, the High Street Task Force has developed a manual counting programme that many towns are undertaking, some relying on volunteers to carry out the counts. It is also possible to calibrate WIFI or mobile phone data with expert help, to give an indication of levels of activity.

This footfall review is predominantly intended to be a reference document, to understand how England's high streets are recovering and evolving as a result of COVID-19. It has been written for place leaders, government, and for the delivery arm of the High Streets Task Force. We explain how the report might be used in the following section. The rest of Section 2 explains our methodology.

2.1 How to use this report

This is the second of four annual reports on footfall in England's high streets that form part of the information and data provision from the High Street Task Force's Professional, Research and Data Group. The first report, published in August 2020, covering July 2019 to Jun 2020², is recommended reading in conjunction with the present document, because it covers more of the pre-2019 background. Nevertheless, this current review has been written as a 'stand-alone' document and summarises all the main points from earlier work required to understand it.

The Task Force is funded by government until June 2024 and offers support to local authorities and other place-makers and leaders as they seek to transform and redefine their high streets. As mentioned above, the main purpose of the report is one of reference, to understand how footfall is changing on England's high streets; present various town types, based on patterns of annual, weekly and daily footfall; and last but not least, help to mitigate the effects of COVID-19.

¹ <https://www.highstreettaskforce.org.uk/resources/details/?id=9e0db5fe-211f-4eea-9d5b-040605328036>

² <https://www.highstreettaskforce.org.uk/media/b5dnkp4z/hstf-footfall-report-2020-for-publication.pdf>

2.1.1 Local Authorities

Councils with planning authority can use the report to compare trends in footfall against the national trends identified in the report (Section 4), both pre- and post-pandemic. It is important to identify those places that may not be recovering their previous form and function, which seems to be the case for many larger centres since the start of the COVID pandemic.

Comparing footfall volumes to the levels in the activity hierarchy presented in Section 5 can assist planning authorities with future designations (district, town, regional centre, city) based on activity levels as the country emerges from the pandemic.

In addition, any local authorities that have at least two years of pre-pandemic historical footfall data for particular locations will be able to identify the town types of those settlements (comparison, speciality, holiday and multifunctional). This will help them to develop strategies for recovery and reinvention that are congruent with the underlying function of the town (see Section 5). Understanding the daily and weekly footfall profile will also ensure initiatives to encourage more people to use or invest in the town are successful.

2.1.2 Town councils, BIDs and other place partnerships

Town councils, BIDs, town teams and other place partnerships can use the report in a similar way to local authorities. Whilst these organisations do not have statutory responsibility for planning, they may be able to provide the local analysis needed to understand how specific locations are faring, in relation to national footfall trends (Section 4). These organisations are well placed to bring together local stakeholders to explore the town types (Section 5) and work up plans and strategies that are congruent with these functions.

2.1.3 Community groups and local business associations

In some towns and neighbourhoods there is no formal partnership, BID or other organisation, like a town or parish council, that 'coordinates' the high street. In these cases, community groups and/or local business associations, like Chambers of Commerce, can use the report in the same way as the town councils, BIDs or other place partnerships, to build a better understanding of the town, to assist the local planning authority with designations or local plans, and to share the insight around businesses and other key players. Even where place partnerships exist, community groups and local business associations can be really helpful in providing additional capacity and expertise in analysing data and presenting and disseminating results.

2.1.4 Users of the High Streets Task Force Standard or Advanced Dashboards

Over 450 high streets now have a Standard or Advanced Dashboard, provided by the Task Force, to help understand and analyse footfall in individual locations. Individual users that have dashboard access and/or who are involved in the manual counting programme can learn more about broader footfall trends through reading this report.

If you would like to find out more about High Street Task Force Dashboards or the manual counting programme then please visit the Task Force website

(<https://www.highstreettaskforce.org.uk>).

2.2 Method

The data analysis has been undertaken by a team from Cardiff University and the Institute of Place Management at Manchester Metropolitan University. A full list of authors can be found at the front of this report.

2.2.1 Analysing historical footfall

The footfall data is obtained from automated counting technology, provided by Springboard³. Springboard's counters record the number of people passing by a given point every hour, and we accumulate this into yearly, monthly, daily or hourly time series, as required. We also combine counts from different locations (for example, all the town and city locations in England) to obtain an overall picture. When comparing footfall from different time periods, for example to obtain a five-year trend as we do in Section 4, it is important we have exactly the same towns and counters in the whole data set. For this reason, there are differences in the number of towns contributing to a particular data set, depending on the time period covered. For the five-year trend between 2015 and 2019, only counters that have been active for the whole of the period can be used. As more counters have been added (and a few removed) over the years, data sets covering only short periods of time and those covering more recent years are likely to include more locations in more towns and cities. A limitation of this study is that we only have footfall data for a maximum of around 180 town centres/high streets and 600 individual counter locations in England. However, this is a dynamic situation, with counters installed in new places every year, and some counters being removed, which means in practice we usually work with far fewer than 600 counters to ensure continuity throughout a given time period.

2.2.2 Forecasting footfall

In Section 4, we used sophisticated modelling techniques to forecast what footfall would have looked like in 2020 without the COVID-19 pandemic. The forecasting technique involved the use of four model libraries from the R programming language (Auto-ARIMA, ETS, TBATS and NNETAR). First, we accumulated monthly Springboard footfall data from locations in towns and cities throughout the country to form a combined time series to represent the whole of England. Next, we tested each of the four R models in turn to discover which one produced the smallest modelling error on our time series data. The best performance was observed from the Auto-ARIMA method, as is illustrated in Figure 4, Section 4.

2.2.3 Case studies

In Section 7 we have selected 4 case-study locations that have been impacted by the pandemic in different ways. Brixton, Newquay, Manchester and London's New West End. We have interviewed place managers in these locations to understand more about the impact of the COVID and augment the national trends and data we have analysed in this report with the local knowledge that is needed to really understand specific high streets.

For all of the case-study locations selected we have provided some basic contextual information. This is contained in:

- i) a map of the area showing a centre boundary and also the location of the Springboard footfall counters.

³ <https://www.spring-board.info>

- ii) a table showing the retail centre ID corresponding to the centre boundary referred to above (where relevant), the number of retail units in the boundary, the population within the boundary, the population within 5 miles of the centre and a population estimate from the relevant ONS built up area.

We provide an explanation of the methods and sources used for this contextual information below.

Retail centre boundaries

For Brixton, Newquay and Manchester, the retail centre boundaries, or town centres (TCs) are the historic TCs from the Consumer Data Research Centre (CDRC) produced from the 2015 Local Data Company (LDC) retail units location datasets, and built using the Graph-DBSCAN method.⁴ These were reviewed by local place leaders and managers and were deemed to be acceptable representations of the centres. These are the boundaries that are contained within the HSTF Standard and Advanced Dashboards in the location maps. The same boundaries are also used to identify the number of businesses in the location (for the social media sentiment analysis provided within the dashboard by Maybe*).

For the New West End however, the CDRC boundary was Central London and much larger than the area of interest, so we have used the boundary of the Business Improvement District and contained this within a simple rectangle, to illustrate the boundary and also estimate population number within and around the area.

Retail centre IDs

As explained above, we have used the historic TCs from the Consumer Data Research Centre for Brixton, Manchester and Newquay. Each of these boundaries has a unique TC ID and can be found on the Consumer Data Research Centre website <https://data.cdrc.ac.uk/dataset/historic-retail-centre-boundaries>.

Population in retail centre

For Brixton, Manchester and Newquay it was possible to identify CDRC TCs containing all the Springboard counters. The population was then computed by finding all the ONS small output area centroids within the appropriate boundary, and then adding together the estimated populations from the ONS (latest mid 2020) for all these output areas (see example below for Brixton).

⁴ Pavlis M., Dolega L. Singleton A. 2017. A Modified DBSCAN Clustering Method to Estimate Retail Center Extent. <http://onlinelibrary.wiley.com/doi/10.1111/gean.12138/pdf>



As explained earlier, London New West End, forms part of a large CDRC TC called Central London. For this reason, we used a simple rectangle to enclose the Springboard counters and added together all the ONS mid 2020 population estimates for the OAs with centroids within the London New West End Rectangle (see over).



Population in 5-mile radius of centre

This time we constructed a circle of 5-mile radius around the centroid of each TC for Brixton, Manchester and Newquay, and added together the ONS mid 2020 population estimate for each OA centroid contained within this circle (see Manchester example in Figure 3). For London New West End, we selected a counter central to the rectangle, and took our 5-mile radius from this.



ONS Built Up Areas (2011 Census)

We found population estimates for Brixton, Manchester and Newquay in tables available from the ONS through NOMIS ⁵.

Comparing the ONS built up area (BUA) populations with those obtained by our methods, it is interesting to note that the BUA population for Brixton is close to the value we obtained for the TC. However, for Manchester and Newquay the BUA populations are close to the populations we obtained using a 5-mile radius from the TC centroid.

Number of retail units

For Brixton, Newquay and Manchester we used the number of occupied retail units associated with the CDRC retail centre boundary. This data was from the 2015 Local Data Company (LDC) retail units location datasets. Retail units refer to any establishment in a retail centre, regardless of its functionality, and are included in every category in the Use Classes (Class A, B, C, D E, F, and Sui Generis). Therefore, retail units can be restaurants, shops, museums, banks, churches, libraries, leaser centres, gyms, health centres, etc.

For London New West End we used the number of businesses in the Business Improvement District area⁶.

⁵ <https://www.nomisweb.co.uk>

⁶ <https://www.newwestend.com/>

3 COVID-19 Pandemic and Key Dates

Since the imposition of the first lockdown on 23rd March 2020, England has experienced many changes to the levels of COVID restrictions, increasing or decreasing them to align with the government's latest assessment of risk to the community at large and the NHS in particular. Table 1 summarises key dates that are likely to have influenced footfall levels in English towns and cities. The dates in this table have been sourced from two government publications⁷. However, we have selected only those dates that we consider to have a major influence, and many more dates and details can be found in the above cited publications.

Table 1 is intended as a reference throughout the present document.

Table 1: Key Dates for imposing and releasing COVID restrictions in England.

2020	
DATE	ACTION
23 rd March	First lockdown begins.
15 th June	Non-essential shops re-open.
4 th July	Pubs, restaurants, hairdressers and some tourist leisure facilities re-open with social distancing.
3 rd August	Eat Out to Help Out scheme begins.
14 th August	Further easing of lockdown: theatres, bowling alleys and soft play open with restrictions.
22 nd September	Return to working at home and 10 pm curfew on hospitality.
14 th October	New three-tier system starts.
5 th November	Second lockdown begins.
2 nd December	Second lockdown ends and England returns to a stricter three-tier system.
2021	
DATE	ACTION
6 th January	Third lockdown begins.
12 th April	Non-essential shops re-open. Outdoor venues including pubs, restaurants, zoos and theme parks re-open as do some tourist indoor leisure facilities such as gyms.
17 th May	Third lockdown ends and England returns to a stricter three-tier system.

⁷ <https://www.instituteforgovernment.org.uk/sites/default/files/timeline-lockdown-web.pdf> and <https://www.instituteforgovernment.org.uk/charts/uk-government-coronavirus-lockdowns>

4 Overall Footfall Trends in England

This section will cover historical trends in English footfall during the five years before COVID-19 hit and show the catastrophic effect that the pandemic has had. Footfall had already been falling slowly in recent years. Figure 4 shows average monthly footfall for the five years before COVID, based on 242 counter locations in 98 English towns and cities. The overall drop from 2015 to 2019 was just under 4 %. Although slowly declining in magnitude, a similar month-by-month pattern can be observed every year during this five-year period, which in normal circumstances would make it possible to produce relatively good forecasts for the following year or so. Figure 4 also shows a forecast for 2020 and 2021 based on the previous 5 years, indicating an additional decline of about 1.4 % of annual footfall on 2015 levels.

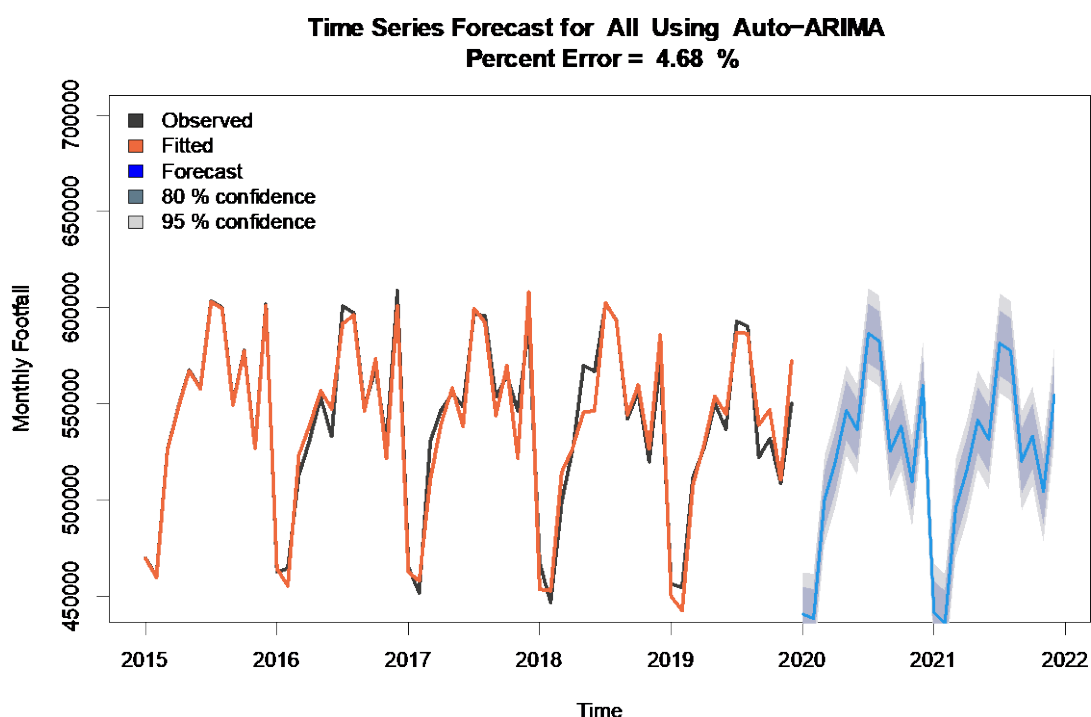


Figure 4: Average monthly footfall for 242 locations in 98 English towns and cities for the five years before the COVID pandemic. The figure includes forecasts for 2020 and 2021 based on pre-pandemic trends.

We know now, however, that the commonly applied forecasting methods based on several past years of data are no longer appropriate, following the exceptional influence of the COVID pandemic. This is illustrated in Figure 5, where we compare the forecasted average monthly footfall between January 2020 and June 2021 against actual recorded average monthly footfall over the same period. The 242 locations used here are the same as plotted in Figure 4.

Although we have explored short-term forecasting, that takes COVID restrictions into account, at the present time footfall data is far too chaotic to make reasonable predictions. This reinforces the importance of high streets collecting their own data and understanding the nature of their own recovery.

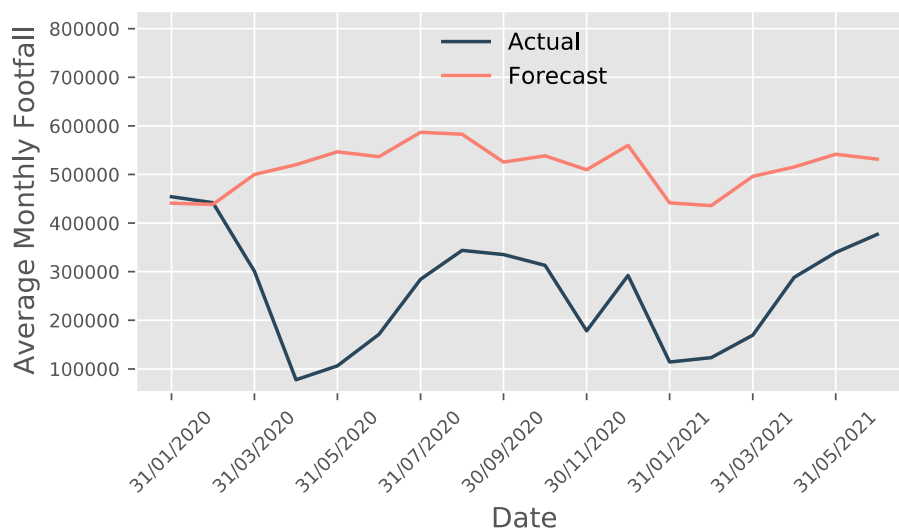


Figure 5: Comparison between average footfall in England with a pre-COVID forecast based on the previous five years monthly data.

Last year, our report identified that the impact of the pandemic on footfall was not uniform (for example smaller places fared better than larger ones) and we suggested some trends may ‘stick’ post-pandemic (for example Saturday no longer being the ‘stand-out’ busiest day of the week on the high street). Taking a closer look at overall changes in annual, weekly, and daily footfall trends from the beginning of the pandemic until 30th June 2021, for towns and cities in England will help us to understand if there is to be a ‘new normal’ and what that might be, in footfall terms.

4.1 Recent Annual Trends

Figure 6 shows average daily footfall in English towns and cities for 2020 and the first half of 2021, with key dates indicated.

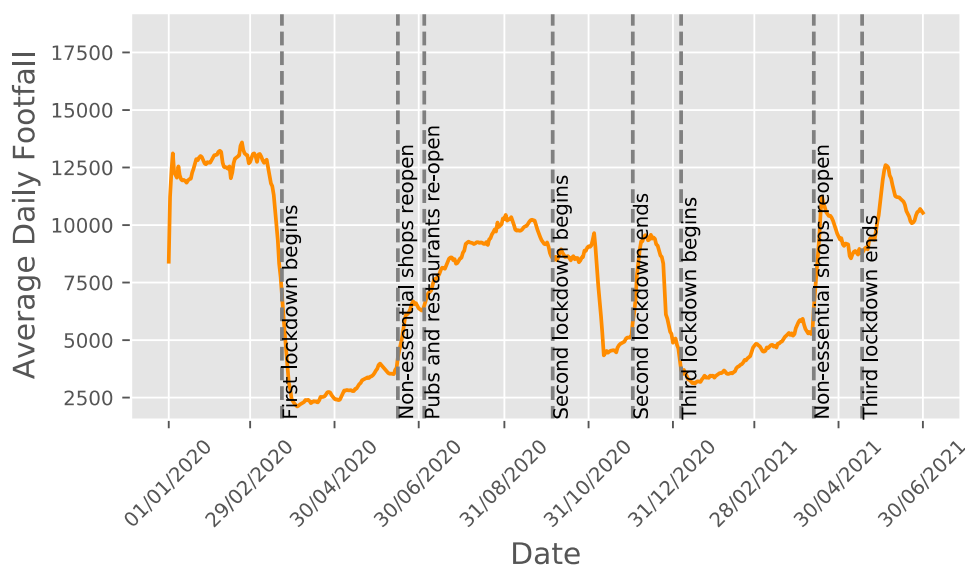


Figure 6: 7-day rolling average footfall for 425 locations in 171 English towns and cities during 2020 and up to the 30th of June 2021, showing key dates.

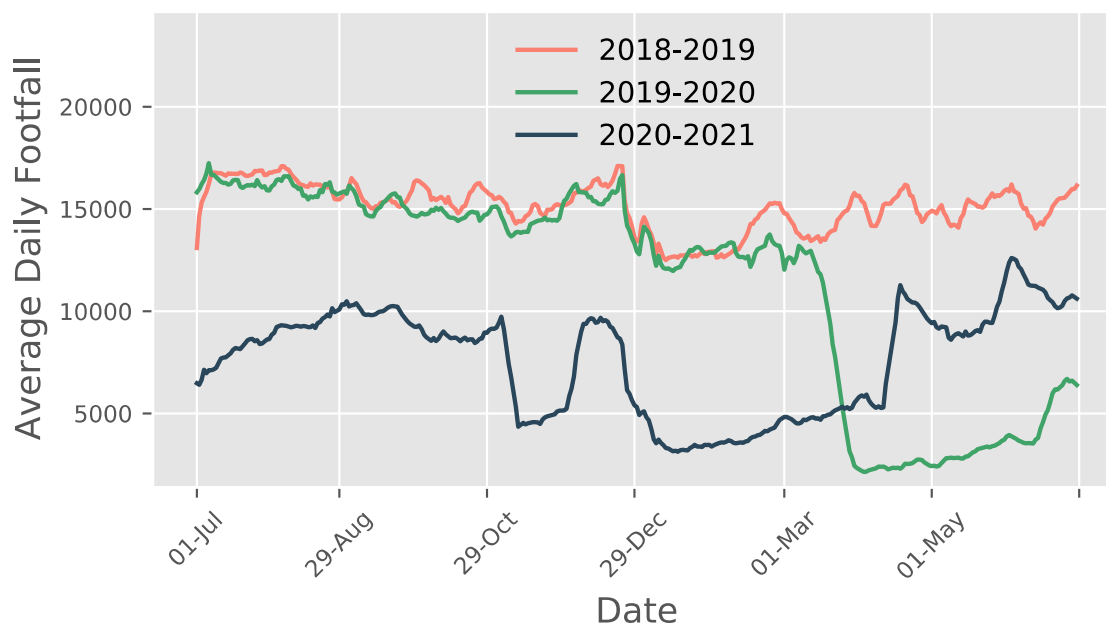


Figure 7: 7-day rolling means to compare July – June for the years 2018 – 2019, 2019 – 2020 and 2020 – 2021 from 402 locations in 164 English towns and cities.

Figure 7 compares footfall during the period July to June in three consecutive years: 2018 – 2019, 2019 – 2020 and 2020 – 2021. The plots are 7-day rolling averages. Clearly, the pandemic has led to a massive decline in footfall – not surprising as the population was told to stay home for many months. As can be observed from Figure 7, the lowest period for footfall was following the first lockdown in the Spring of 2020. From the rolling mean values used to plot this graph, we observe that the level of footfall drops to a mere 14 to 15 % of 2019 values in the same period, at the end of March 2020.

Whilst the graph clearly shows the reduction in footfall during 2020 and 2021 compared to pre-pandemic levels, it also shows that, once restrictions are eased/lockdowns end, there is a footfall recovery, illustrated by the rolling mean line sloping upwards. In our last report we reflected on recovery after non-essential retail opened on the 15th June 2020. We can compare this to the recovery after non-essential retail reopened again on the 12th April 2021, along with a number of other high streets attractions (such as pubs and restaurants, and gyms etc.) and all restrictions ended on the 17th May 2021. Figure 8 shows that the recovery gradient is much steeper following the opening of non-essential retail on 12th April 2021 (112.9 % in the first week) than was the case in 2020 when non-essential retail opened on the 15th June (62.9 % in the first week). A further very small recovery in 2021 (7.7 % in the first week) can be observed after the reopening of hospitality and the relaxation of some other restrictions. The stronger recovery in 2021 is likely to reflect the impact of the vaccination programme as well as the ending of mandatory measures/restrictions.

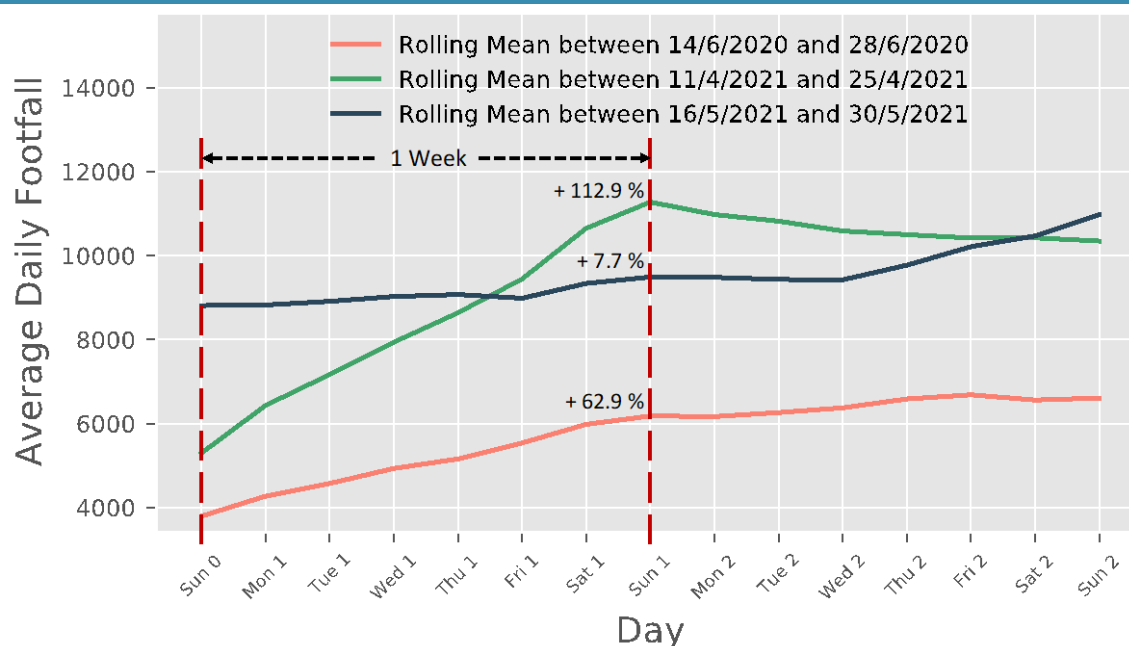


Figure 8: Change in average daily footfall for 402 locations in England in the two weeks following the easing of various COVID restrictions in England. 15/6/2020 = re-opening of non-essential retail after lockdown 1; 12/4/2021 = re-opening of non-essential retail after lockdown 3; 17/5/2021 = re-opening of hospitality and easing of other COVID measures. The curves are 7-day rolling averages, and percentage changes have been computed for the first week following easing of restrictions.

4.2 Monthly Comparisons

We can observe the position month by month in Figure 9 which shows the average monthly footfall by volume for our sample of English towns and cities for 2019, 2020, and 2021. Again, the graph clearly shows the devastating effect of the pandemic, but with some recovery in 2020, from April, when non-essential retail opened again, ending in October when the tier system re-introduced restrictions across much of the country. A stronger recovery is apparent from April 2021.

We will have to wait at least until 2022 before we can ascertain whether there have been any long-lasting changes to monthly footfall patterns, as we will need a complete year free of restrictions to compare with the last pre-pandemic year, 2019.

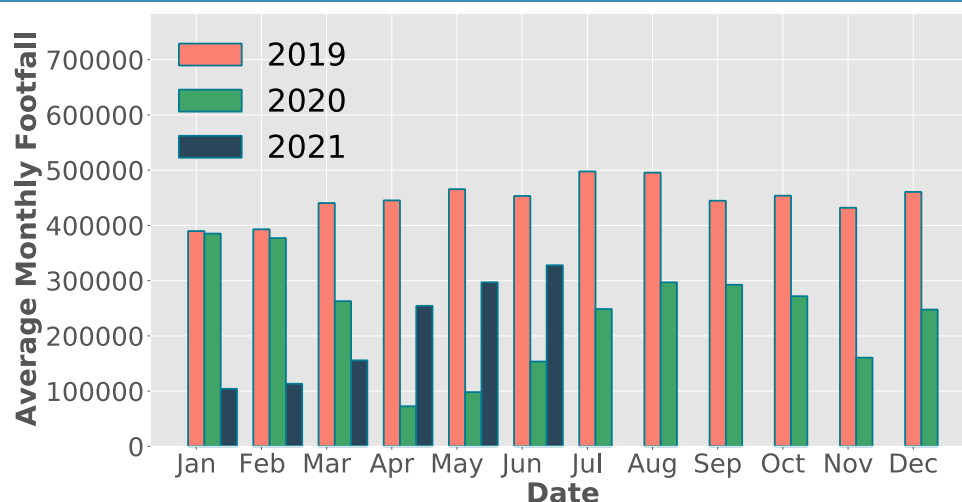


Figure 9: Total monthly footfall for 425 locations in 171 English towns and cities. Comparing 2019, 2020 and 2021.

4.3 Daily Comparisons

Figure 10 illustrates the level of footfall over our sample, averaged for each day of the week, comparing 2019 levels with 2020 and 2021. This time instead of the footfall volumes, we are comparing the percentage split for each day of the week, so that the total footfall for each year adds up to 100%. We can observe small changes in these patterns for the three years, although we have data for only half of 2021.

In Figure 10 we can see how the 2020 lockdown marginally reduced variation in footfall across days of the week, probably because people were working from home and had more flexibility to visit shops and town centres during weekdays. In 2021, however, as people are returning to workplaces, the weekly footfall patterns appear to be similar to that of 2019, with higher footfall on Saturdays again. This would suggest that, when it comes to visiting the high street, consumer behaviour is quite entrenched – and there is no evidence here of dramatic long-term changes in consumer behaviour post-pandemic when it comes to the days of the week people visit their high streets.

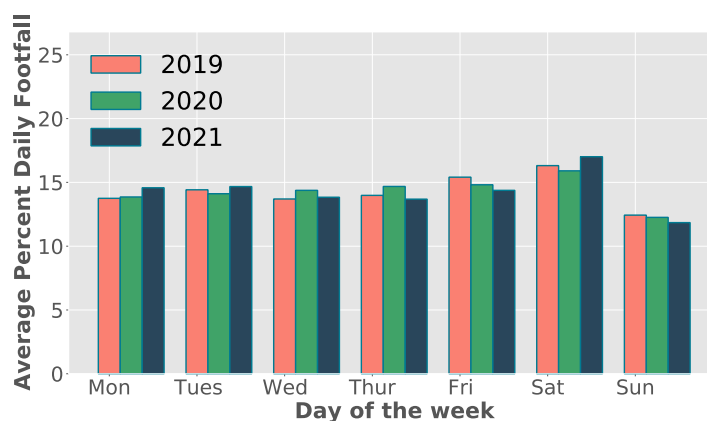


Figure 10: Average daily footfall from 425 locations in 171 English towns and cities. Comparison between 2019, 2020 and 2021.

4.4 Daytime and Night-time Economies

Figure 11 shows the spread of footfall through the hours of the day. Defining the daytime economy between 6 am and 6 pm, it accounts for 80.7 %, 83.5 %, and 86.5 % of daily footfall for 2019, 2020, and 2021, respectively. Clearly the night-time economy has suffered more, proportionally, than the daytime economy throughout the pandemic. This is because hospitality, and especially nightclubs, have been closed for longer than non-essential retail (which is open in the daytime). Many festivals and night-time events that would normally animate our high streets at night, driving night-time footfall, have also been cancelled.

As with the daily comparisons, the graph illustrates that there is no evidence of dramatic changes to consumer behaviour between 2019 and 2021 – the majority (over 80% of people) still visit their high streets between 6am and 6pm. However, in 2021 there has been a shift of 6% of evening footfall towards the daytime and place managers may have to work harder to encourage some people back to the evening/night-time economy. After over a year of COVID and restrictions, people may have got out of the habit – but also because this sector has suffered the most severe restrictions, there may not be the same evening/night-time offer in town centres, if businesses have not managed to survive.

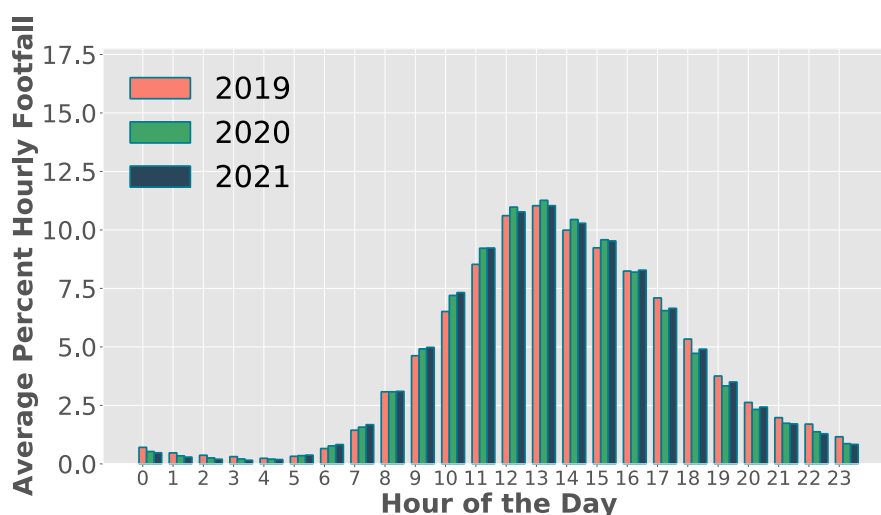


Figure 11: Average hourly footfall for 415 locations in 168 English towns and cities. Comparing 2019, 2020, and 2021

5 Classifying High Streets by Activity Patterns and Volumes

This section covers two types of classification; town signatures and the activity hierarchy. First, we look at town signatures, which are identified by annual, weekly, and daily footfall patterns. These signatures help us discover how towns are used by their residents and visitors, throughout the months of the year, days of the week, and hours of the day. The annual, weekly, and daily footfall signatures are dealt with in separate subsections, each beginning with a brief description of the methodology and pre-COVID classifications, and then for the weekly and daily patterns we look at how the situation changed in 2020, the first year of the pandemic. Regarding the annual footfall signatures and classification for 2020, as we found these particularly interesting, they have a whole section to themselves (Section 6).

Section 5 concludes with a classification based on annual footfall volumes, which we call an activity hierarchy. We also examine the stark changes in these volumes between 2019 and 2020.

5.1 Annual Signatures

Based on a *K*-Means clustering analysis carried out on 10 years of footfall data from Springboard, up to and including 2016 across 125 UK retail centres, Mumford *et al.* (2020)⁸ discovered four distinct 'footfall centroids' representing the centres of four clusters in our analysis, each town and city in our study being classified according to the centroid that their annual footfall pattern (or signature) most closely resembled. For this analysis, we computed an average value for monthly footfall for each town or city individually. Many centres have more than one counter location, however, and in such cases we took an average over all counters located within a particular town or city, covering all the full years for which footfall had been collected for each counter location, omitting any counter that had been operational for less than two years.

We have since adopted these four patterns, illustrated in Figure 12, as templates for classifying town types in subsequent years, rather than carry out a repeat the *K*-Means exercise. In this way we can discover how places change over the years, in relation to these benchmarks. Table 2 specifies the number of towns and cities identified in each category for footfall collected between 2017 and 2019 inclusive (left) and 2014 to 2016 inclusive (right), out of a total of 145. As in our previous work, we required at least two years of data per counter, and ensured that exactly the same towns and cities were used in each case. However, from 2020 footfall has been so disrupted by COVID that we are currently unable to classify centres using these benchmarks. Instead, we have carried out a new clustering study on 2020 data only in Section 6, and used these to help analyse the varying levels of 'COVID resilience' in English towns and cities.

⁸ Mumford, C., Parker, C., Ntounis, N., & Dargan, E. (2020). Footfall signatures and volumes: Towards a classification of UK centres. *Environment and Planning B: Urban Analytics and City Science*. <https://doi.org/10.1177/2399808320911412>

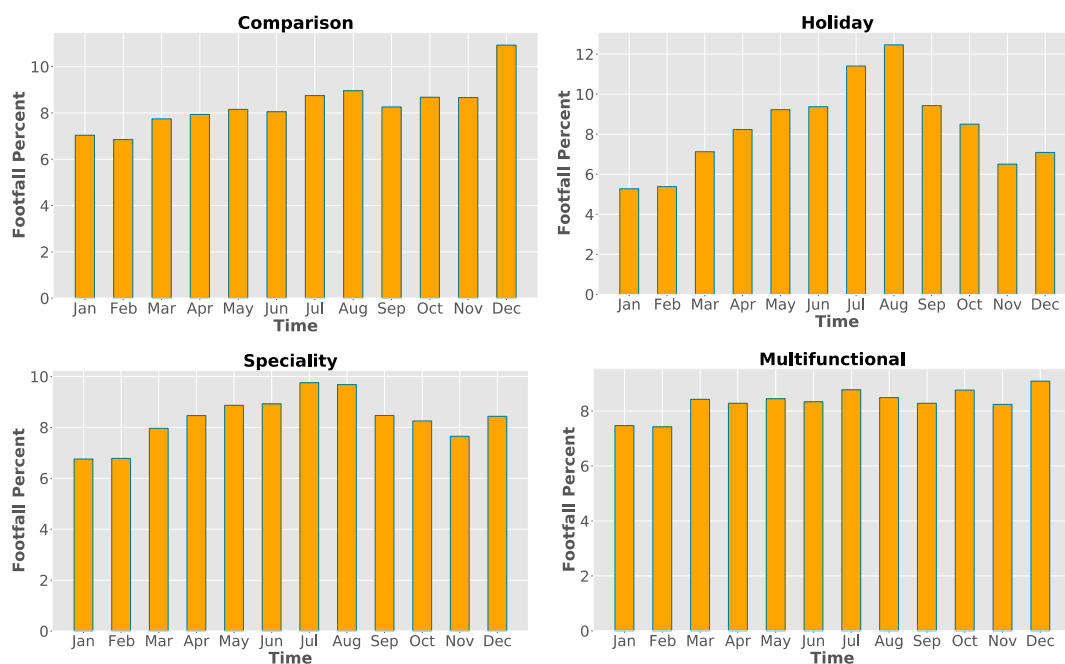


Figure 12: Annual Centroids for the UK.

From Table 2 we can observe a marked decrease in comparison towns and a notable increase in speciality towns during 2017-2019, whilst holiday and multifunction towns remain at roughly the same level. Indeed, a χ^2 contingency test indicates that these differences are significant at the 0.025 probability level. Table 2 also gives the values for the average annual footfall for each town type recorded over the two time periods at the busiest counter location in each case. We can see that footfall for all town types decreases between the two time periods, and it is worth noting that overall footfall between the two periods decreases, with the averages taken for all towns dropping 7618647 for 2014 – 2016, to 6556921 in 2017 – 2018, some 14 %.

Table 2: Classification of UK towns during the two periods 2014 – 2016 and 2017 – 2019.

Annual signature	2014 – 2016			2017 – 2019			% Footfall drop for Town Type
	Number of towns	% of towns	Average Annual Footfall	Number of towns	% of towns	Average annual footfall	
Comparison	32	22.1 %	8785654	13	9.0 %	8350491	5.0 %
Holiday	13	9.0 %	5643049	14	9.7 %	4851774	14.0 %
Speciality	36	24.8 %	8172899	53	36.5 %	7008312	14.2 %
Multifunctional	64	44.1 %	7072635	65	44.8 %	6131867	13.3 %

Examining the detail of how individual towns change their classification reveals a rather complex picture, with 11 comparison towns changing to multifunctional, and 9 becoming speciality. On the other hand, we note that 11 multifunctional towns from 2014 – 2016 become speciality towns in 2017 – 2019. The full picture can be seen in Table 3.

Table 3: Changes in town type classification for UK towns between the two periods 2014 – 2016 and 2017 – 2019.

2014 - 2016		2017 - 2019			
Annual signature	Number of towns	Number of towns Comparison	Number of towns Holiday	Number of towns Speciality	Number of towns Multifunctional
Comparison	32	12	0	9	11
Holiday	13	0	12	1	0
Speciality	36	0	2	32	2
Multifunctional	64	1	0	11	52

For these annual signatures, we think it is sensible that locations keep their pre-pandemic classification until we have a complete year of undisrupted footfall data to work with. The classification for all individual towns in England, with the necessary data for at least one of the time periods in Table 2 is included in Appendix A. However, please note that the towns classified in Appendix A are only those located in England, whereas the towns in the two tables above cover the whole of the UK. Also, it is possible to classify additional English towns in Appendix A that only have a partial history of footfall data during the three time periods of interest, leaving ‘gaps’ where data is not available. We are not analysing overall trends in the Appendix, but simply giving details about individual towns, that may be helpful to their place managers and leaders.

5.1.1 Comparison Towns

Comparison Towns are the more traditional shopping centres, typically located in larger town and city centres, which are often also important employment and educational centres. They are characterised by a footfall peak in November and December, coinciding with the Christmas shopping period. People visit predominantly to shop and may travel a considerable distance to do so. These towns have a wide range of retail choice, leisure, food, and beverage, as well as strong retail anchor(s) and presence of multiples and international brands (e.g., Manchester).

From 2016 to 2019 the number of Comparison Towns in our sample fell from 32 to 13, a reduction of 60%. 11 former Comparison Towns evolved into Multifunctional Towns. 9 former Comparison Towns evolved into Speciality Towns.

5.1.2 Holiday Towns

Holiday Towns are visited mainly by tourists for a holiday or a ‘day out’. They do not ordinarily concentrate on serving the local catchment, instead focusing on providing entertainment and leisure to visitors. They are busiest in the summer and when the weather is good. People travel a considerable distance to visit. They are attractive to tourists but have relatively weak shopping offer (e.g., Blackpool).

From 2016 to 2019 the number of Holiday Towns increased from 13 to 14, an increase of 8%. One former Holiday Town became a Speciality Town, but two former Speciality Towns became Holiday Towns.

5.1.3 Speciality Towns

Speciality Towns attract tourists but also serve the local population. Like holiday towns they are busiest in the summer months, but also show a (smaller) second footfall peak in December, indicating a 'hybrid' type between holiday and comparison towns. These towns tend to have anchors that are not linked to retail, and offer something unique and special, promoting a strong town identity (e.g. Windsor). Nevertheless, they also have a strong enough retail offer to also attract shoppers in the run up to Christmas.

From 2016 to 2019 the number of Speciality Towns has increased from 36 to 53, an increase of 47%. Two Speciality Towns became Holiday Towns and another two became Multifunctional Towns. 9 Comparison Towns and 11 Multifunctional Towns became Speciality Towns. This may reflect the current investment in culture and heritage-led regeneration.

5.1.4 Multifunctional Towns

Multifunctional Towns are a diverse group, coming in many shapes and sizes, and serve a variety of everyday needs, such as convenience shopping, leisure, and employment. They are characterised by a flat footfall profile throughout the months of the year. The volumes of footfall are indicative of the catchment areas these people are drawn from, so large multifunctional centres (cities such as Sheffield) are drawing people from a wider area than the small multifunctional centres (towns or districts), that are serving a local catchment (e.g., Withington in Manchester).

From 2016 to 2019 the number of Multifunctional Towns increased from 64 to 65, or an increase of 2%. However, there was a lot of 'churn' in this class. One former Multifunctional Town became a Comparison Town and 11 became Speciality Towns. 11 former Comparison Towns became Multifunctional and two former Speciality Towns became Multifunctional Towns. It is possible that there are two types of Multifunctional Towns. The first type is truly Multifunctional and will maintain this signature over time because they are centres for shopping, employment, culture etc. that meet their needs of their catchment (large or small). The second type could be thought of merely ex-Comparison or ex-Speciality Towns. They have a flat profile just because they are no longer serving those previous functions, and not because they are successful multifunctional centres. We will investigate this further when we conduct a review of annual signatures in 2021 when a full year of undisrupted data is available.

5.2 Weekly Signatures

As well as examining annual signatures, Mumford et al. (2017)⁹ have examined footfall profiles for days of the week and discovered two distinct patterns in these.

⁹ Mumford, C., Parker, C., Ntounis, N., & Dargan, E. (2017). A clustering study to verify four distinct monthly footfall signatures: a classification for UK retail centres. High Streets Task Force:
<https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwjz9vqkuvHvAhXqVBUIHZCgA6wQFjAAegQIA>

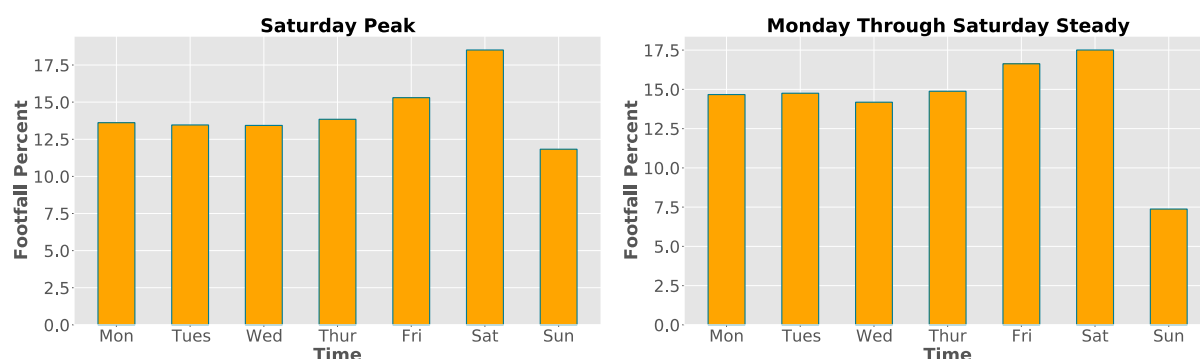


Figure 13: Weekly Centroids for the UK in 2019.

Figure 13 shows the two centroids obtained using K-Means cluster analysis that best classify town and city centres based on activity levels for the days of the week averaged over the whole of 2019, and Table 4 presents the number and percentage of towns and cities classified in each category, as well as the average annual footfall for each category. Once again, the average annual footfall is computed from the counter in the busiest location for each place. As we can see, places classified as 'Saturday Peak' tend to be about twice as busy as those classified as 'Monday Through Saturday Steady'.

Table 4: Percentage of UK towns classified according to their weekly signature for 2019.

Weekly signature	Number of towns	% of towns	Average Annual footfall
Saturday peak	126	57.0 %	7535256
Monday through Saturday steady	95	43.0 %	3877842

5.2.1 Saturday Peak

Saturday Peak type towns show a large peak on Saturday followed by a fairly busy Sunday. Saturday Peak types tend to be larger locations used for weekend shopping (e.g., Manchester).

5.2.2 Monday Through Friday Steady

Monday Through Friday Steady types show steady footfall from Monday to Friday with a slight peak on Saturday, followed by a large drop on Sunday. These tend to be less visited at the weekend (e.g., Morley).

5.2.3 Weekly Signatures for 2020

Figure 14 shows the two centroids obtained using K-Means cluster analysis for the activity levels based on the days of the week averaged over the whole of 2020. By comparing these to the weekly signatures for 2019 (Figure 9) we note that the 'Saturday Peak' profile resembles the 2019 'Saturday Peak' very closely, but the 'Monday Through Saturday Steady' pattern is much flatter for Monday through Saturday than it was for 2019.

Table 5 presents the number and percentage of towns and cities classified in each category and the corresponding average annual footfall computed from the counter in the busiest

[hAD&url=https%3A%2F%2Fwww.highstreets-taskforce.org.uk%2Fresources%2Fdetails%2F%3Fid%3D92833ce3-3a68-436f-8087-1870cd33895b&usg=AOvVaw0XmwbFh3pg_8YpX_yEfUrh](https://www.highstreets-taskforce.org.uk/resources/details/Fid%3D92833ce3-3a68-436f-8087-1870cd33895b&usg=AOvVaw0XmwbFh3pg_8YpX_yEfUrh) .

location for each place. In 2019 the places with ‘Saturday Peak’ profiles were about twice as busy as those classified as ‘Monday Through Saturday Steady’. However, in 2020, the gap between the footfall volumes has dropped considerably. We note a very large drop in footfall for the ‘Saturday Peak’ locations, which are typically the larger towns and cities. However, the smaller places have suffered less, which supports our findings for recovery patterns within our activity hierarchy, illustrated later in this report (Figure 14). An interpretation of this is that our habits for visiting larger centres have not changed, as these are still predominantly visited on Saturdays, but that our habits when visiting smaller centres may have changed and are spread out more across days of the week, making Monday through Saturday even more steady.

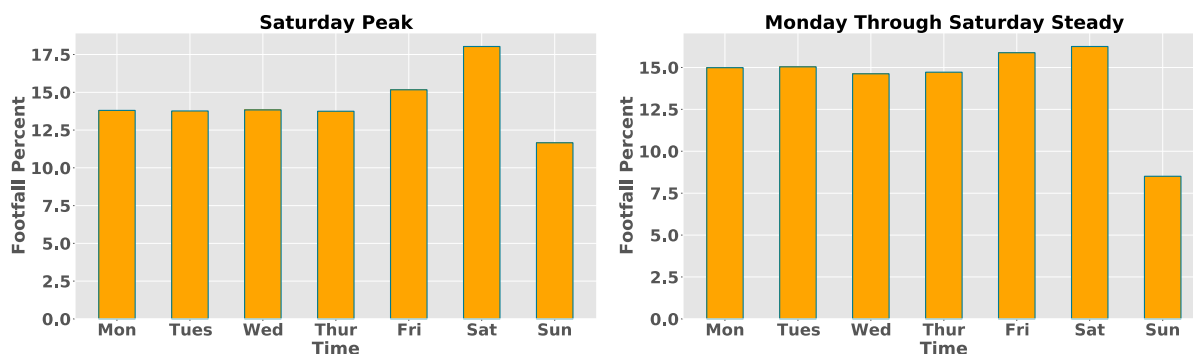


Figure 14: Weekly Centroids for English towns in 2020.

Table 5: Percentage of English towns classified according to their weekly signature for 2020, and average annual footfall for each class (2019 value for the whole UK in brackets).

Weekly signature	Number of towns	% of towns	Average Annual footfall
Saturday Peak	94	52.2 %	4445453 (7535256)
Monday through Saturday Steady	86	47.8 %	2869994 (3877842)

5.3 Daily Signatures

There are two daily footfall centroids that classify centres based on their activity levels throughout the hours of the day: *All Day Economy* and *Midday Economy* (see Figure 15). Table 4 gives the number of towns and cities in each category and the average annual footfall for each classification. Places identified with an ‘all day economy’ tend to be the most visited.

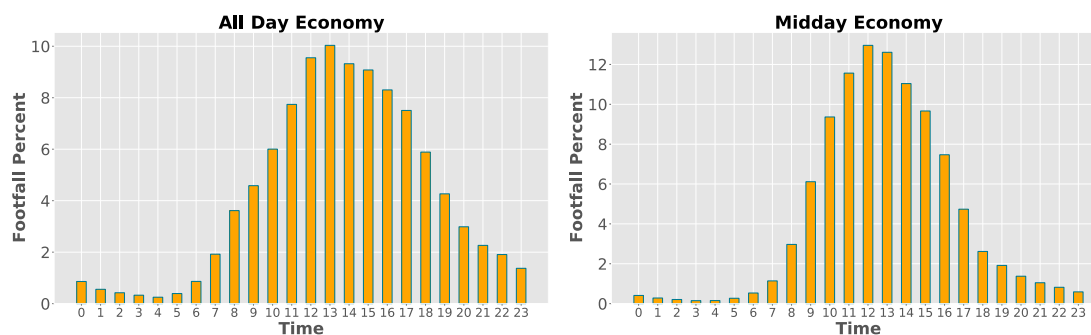


Figure 15: Daily Centroids for the UK in 2019.

Table 6: Percentage of UK towns classified according to their daily signature for 2019.

Daily signature	Number of towns	% of towns	Average Annual footfall
All day economy	81	36.7 %	8601900
Midday economy	140	63.3 %	4571624

5.3.1 All Day Economy

All Day Economy centres typically show a peak in footfall at 1 pm with a slow dropping away in the afternoon, and a reasonable footfall level continued into the evening/night-time (e.g., Liverpool).

5.3.2 Midday Economy

Midday economy centres tend to show a sharper and slightly earlier peak in footfall at 12 pm, and footfall then trails off much more quickly into the afternoon and evening. Towns showing a midday economy tend to be smaller and, therefore, have less footfall in than the larger cities (e.g., Royal Leamington Spa).

5.3.3 Daily Signatures for 2020

The two daily centroids in Figure 16 derived from footfall data for 2020 from English towns are very similar to the UK centroids for 2019 from Figure 10, although the average annual footfall is considerably lower, especially for the towns classified as 'All Day Economy'. The proportion of towns in each class is also similar. Although in Section 4.4 you may recall that we found a decrease in the night-time economy during the pandemic. This leads us to the conclusion that the pandemic has had some impact on our daily routines, in terms of when we visit the high street – but the cause of this is likely to be consumer rather than place related.

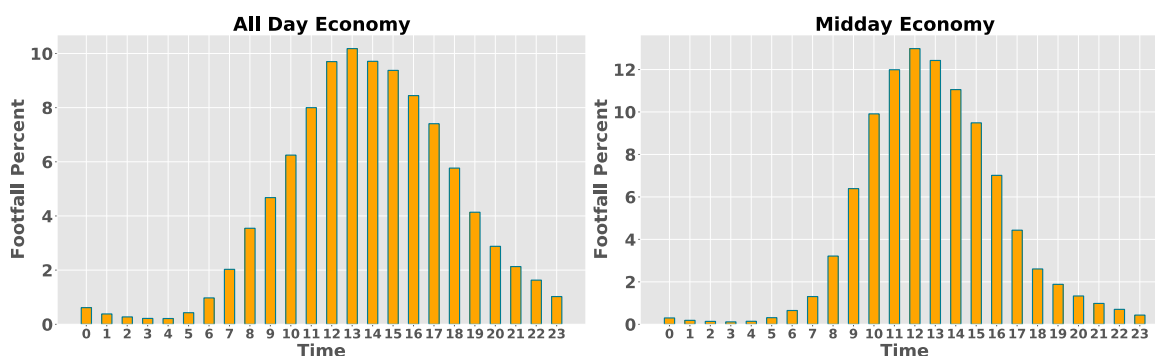


Figure 16: Daily Centroids for English towns in 2020.

Table 7: Percentage of English towns classified according to their daily signature for 2020, and average annual footfall for each class (2019 value for the whole UK in brackets).

Daily signature	Number of towns	% of towns	Average Annual footfall
All day economy	68	37.8 %	4710574 (8601900)
Midday economy	112	62.2 %	3072082 (4571624)

5.4 The Activity Hierarchy

Local planning authorities designate their town and city centres using a retail hierarchy consisting of different settlement sizes such as major city, regional centre, sub-regional centre, major town, town, and district. Recent research, however, shows that often there are large overlaps when it comes to footfall volumes across neighbouring classifications (for example, between regional and sub-regional centres) (Mumford et al. 2020)¹⁰, suggesting that this may not be the most suitable classification when dealing with place attractiveness and planning decisions.

A simplified hierarchy based on footfall levels, that is, *an activity hierarchy*, might be more useful for planners and decision makers, especially as retail is losing its dominance as an anchor for visitation. In this report we have adopted the simplified activity hierarchy suggested in (Mumford et al. 2020), which classifies centres into: major city, regional centre, town, and district by effectively merging regional centres with sub-regional centres and major towns with towns, to form the combined designations of regional centre and town, respectively. Figure 14 gives a visual representation of the mean and standard deviation for annual footfall in 2019, illustrating both the planning designation and the activity hierarchy. The footfall data was provided by Springboard, and we used the annual footfall selected the Springboard counter from busiest location in each town or city.

Figure 17 shows the mean annual footfall values and error bars (standard deviation) for the different hierarchical classifications of 206 town and city centres across the UK, comparing 2020 footfall levels with those of 2019. The top image uses a common retail hierarchy and the bottom image the simplified hierarchy. The large degree of overlap in the categories shown in the top diagram provides our justification for simplifying the classification. Nevertheless, considerable overlap remains even in the activity hierarchy, thus, some reconsideration of the class boundaries may be a useful exercise, to better reflect the reality of how our towns and cities are actually used.

¹⁰ Mumford, C., Parker, C., Ntounis, N., & Dargan, E. (2020). Footfall signatures and volumes: Towards a classification of UK centres. *Environment and Planning B: Urban Analytics and City Science*. <https://doi.org/10.1177/2399808320911412>

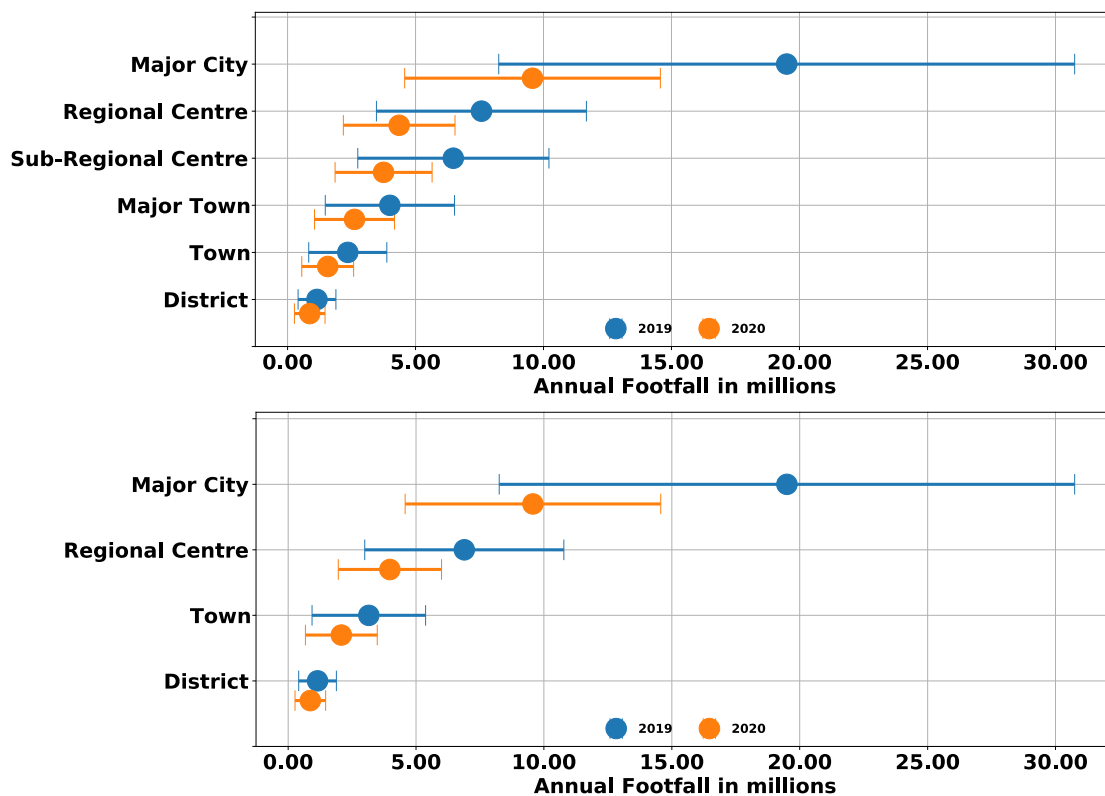


Figure 17: Annual footfall for UK towns and cities in 2019 and 2020 (Springboard) showing means (circles) and standard deviation ranges (error bars) for the UK planning hierarchy (top) and an activity hierarchy (bottom).

6 The Differential Effect of COVID-19 on Various Types and Sizes of English Towns and Cities

The effect of COVID-19 on towns, cities and high streets throughout the UK has clearly been profound. However, it is clear from our investigations that some places have been hit harder than others. In this section we will compare the impact of COVID on different types of towns.

We look at how the pandemic has influenced footfall patterns (or signatures) and volumes over the COVID period. Of particular interest will be to examine whether some places have been affected more than others, and to identify characteristics of COVID recovery and potential COVID re-set, where locations do not seem to be reverting to their pre-pandemic volumes or patterns.

Our analysis shows that holiday and speciality towns as well as small and local centres have recovered faster than the comparison towns, which tend to be large towns and cities.

6.1 Footfall Patterns for England in 2020

Our methods for analysing footfall patterns usually require full years of data (January to December). For this reason, our focus will be on 2020 in this study, publishing the patterns for 2021 in the next report.

We carried out a K-Means clustering study, similar to the one described in the previous chapter. This time our clustering was carried out on Springboard footfall data from 175 English towns and cities for the single year of 2020. As previously, the K-Means clustering was carried out on monthly footfall counts for each centre, based on averaged values over a centre's counter locations, (where a centre has more than one), for each month.

6.1.1 Annual Signatures for 2020

Figure 18 illustrates the centroids resulting from this clustering study, with $K = 4$. The clustering algorithm works by finding four ($K = 4$) different patterns from the data. We chose four as, in our past research, this enabled us to focus on the major differences across towns. Once the algorithm has identified the four different clusters or patterns, then we have to understand what is causing these differences. In other words, the mathematical calculation only finds the different clusters or patterns, the humans have to work out why!

In both studies, the algorithm is looking for differences in the allocation of monthly footfall throughout the whole year. In our previous clustering study, it was the difference in the underlying function of the town driving the different clusters or patterns. However, in this clustering study, we believe it is the extent of the footfall recovery observed during the summer of 2020 that is explaining the different clusters or patterns.

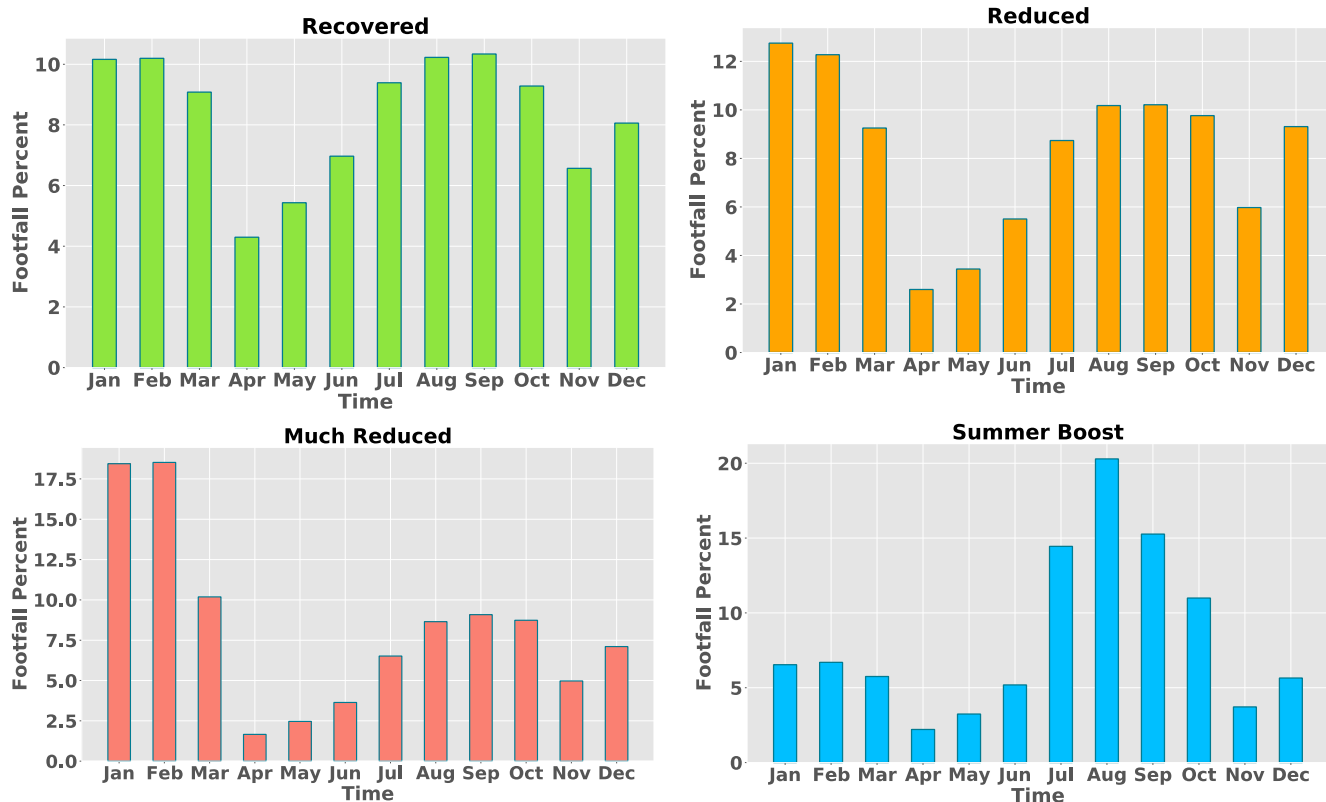


Figure 18: Annual Centroids for 2020

This has led us to label the four centroids according to the extent of footfall recovery observed during the summer months of 2020, following the easing of the first COVID lockdown. Table 8 shows how many towns are classified in each category, and also gives the average total footfall for 2020 for each type. As can be observed, just over half of all towns fall into the 'reduced' and 'much reduced' categories.

Table 8: Percentage of towns classified according to their annual signature for 2020.

Annual signature	2020		
	Number of towns	% of towns	Average annual footfall
Recovered	77	44.0 %	2579847
Reduced	84	48.0 %	4175189
Much Reduced	9	5.1 %	8362097
Summer Boost	5	2.9 %	4226254

If you compare the 2020 centroids with those presented in Figure 8 (the annual footfall signatures) there is some similarity between the recovered and the speciality centroids and even more resemblance of the summer boost to holiday centroid.

In Figure 19 we can see how the new COVID recovery classifications fit into the previously defined town types for each centre. Clearly, comparison towns have fared much worse than the other three town types, with holiday towns recovering best of all, followed by speciality towns.

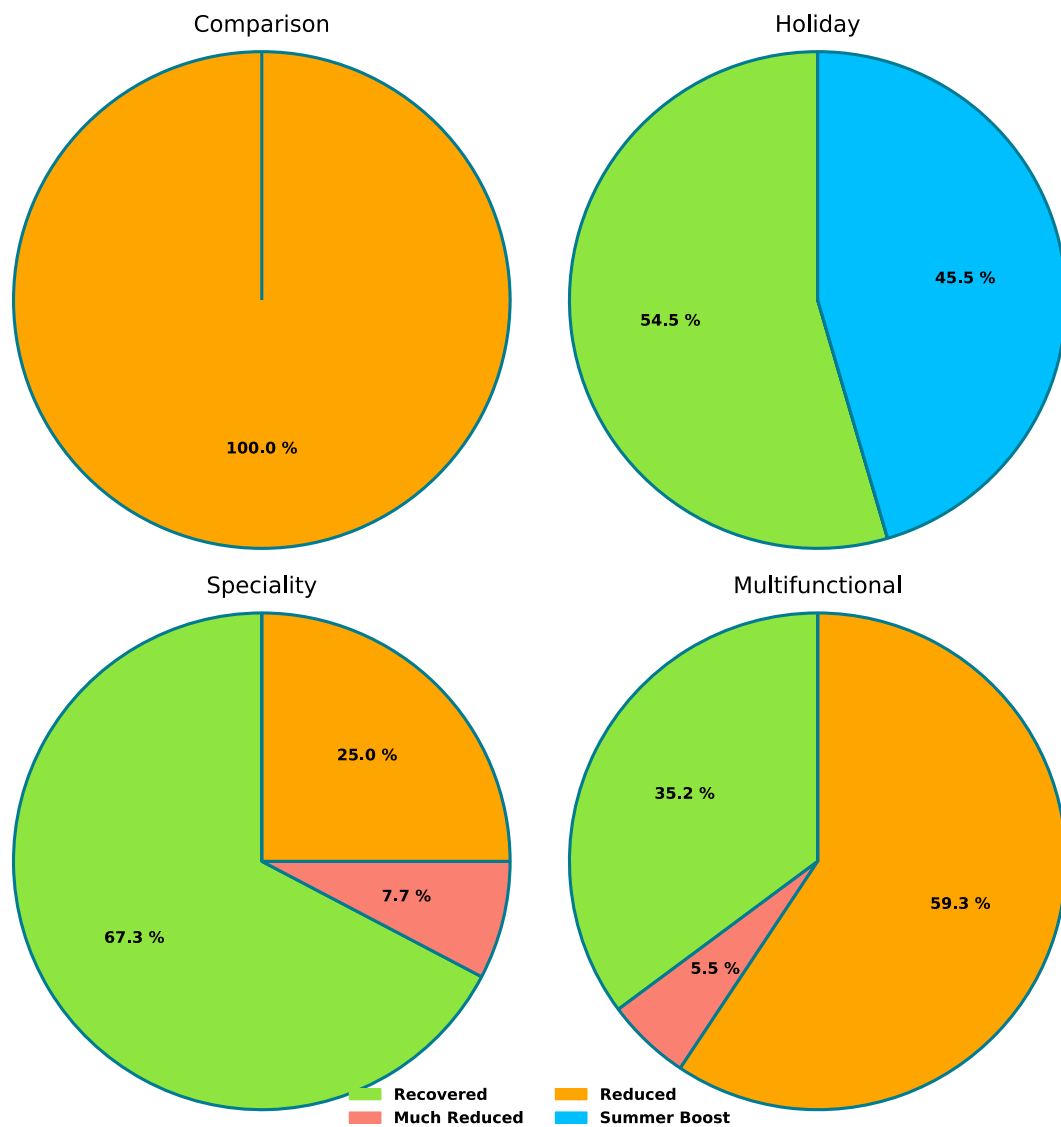


Figure 19: How the 2020 classifications fit into the previously identified town types.

6.1.2 Recovery across the activity hierarchy

Figure 20 shows how the four levels in the activity hierarchy fared in 2020 regarding footfall recovery. As we can see, small and local centres recovered faster than the larger towns and cities.

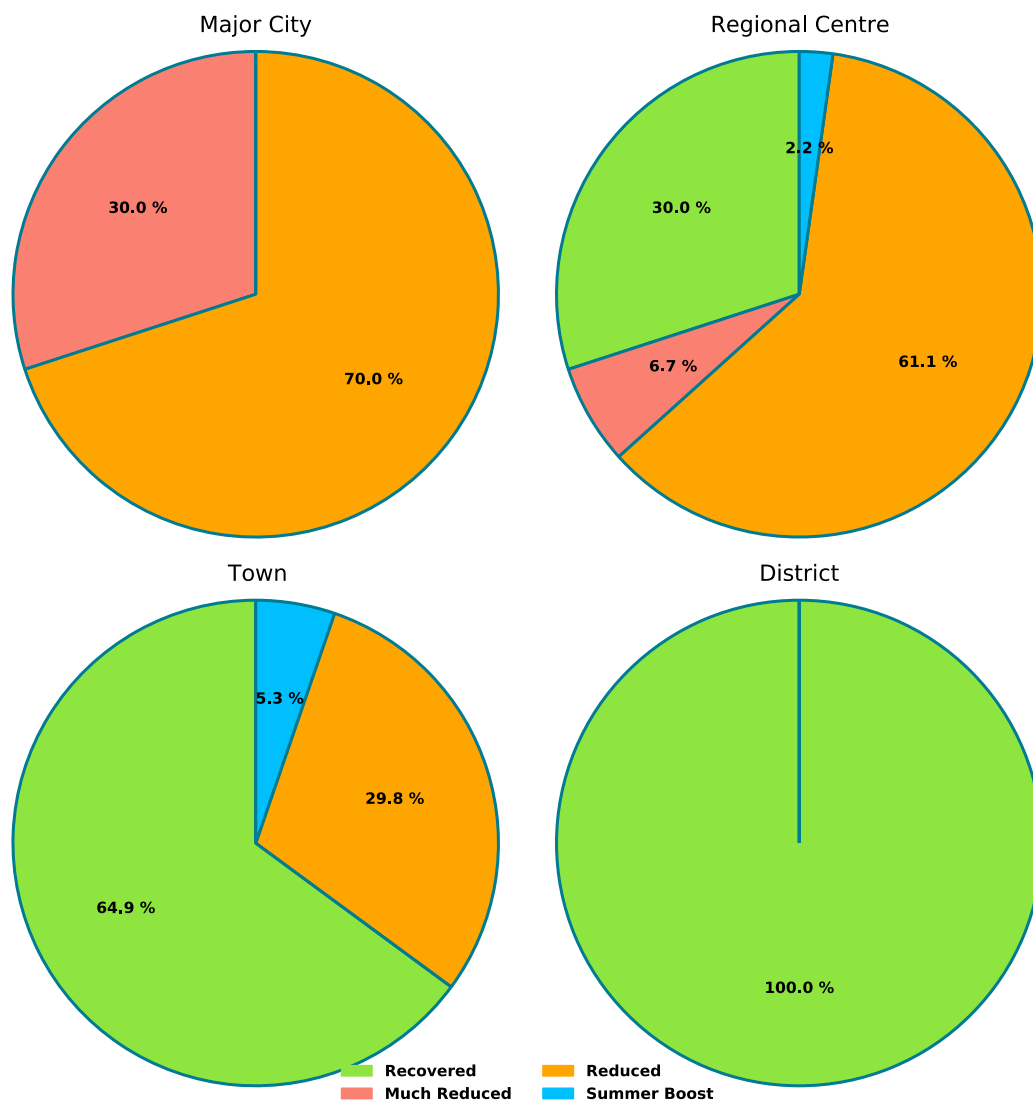


Figure 20: How the 2020 classification fit into the activity hierarchy.

7. Case-studies

There is no doubt that the pandemic has disrupted the usage patterns of our towns and cities in a way not previous experienced. For place leaders and managers the challenge is now to support the recovery of the businesses and communities who depend on their neighbourhood, town and city centres.

Our clustering analysis (Mumford et al, 2020)¹¹ has demonstrated that the recovery 'journey' may be different for different places. For the recovered towns pre-pandemic patterns return as footfall volumes slowly head back to 2019 levels. The challenge for these towns may be to keep the momentum going for some of the more transformational aspirations mooted or even trialled during 2020 – such as making streets safer for pedestrians and cyclists. In the Summer Peak towns the place management issue may be the increased demand from day-trippers and holiday makers – whilst ensuring local people are not discouraged from using their towns. The reduced towns may be facing some changes in their activity patterns from reduced volume of visitation. The challenge here will be to know how much the function of the location has changed. For example, what would a permanent reduction in office workers mean for the rest of the eco-system? For the much-reduced towns understanding any radical shifts in usage and volume as soon as possible is paramount, to ensure recovery strategies and investment are effective – because it may not be a 'return to normal'. Both the reduced and much-reduced towns will need access to data to understand the balance between recovery (back to normal) and transformation (on to a new normal).

Our case-study selection this year is intended to illustrate how particular places are evolving and how place managers and leaders are understanding, managing and, at times, just adapting to these changes.

We have selected an example for each of our 2020 town types; Recovered, Summer Peak, Reduced and Much-Reduced. These are Brixton (Recovered), Newquay (Summer Peak), Manchester (Reduced) and New West End, London (Much Reduced).

A summary of the contextual information for each of the case-study locations is shown in Table 9.

Table 9: Contextual information for case-study locations.

Town	Retail Centre ID (TC)	Population in TC	Population in 5-mile radius of TC centre	ONS Built Up Areas (2011 Census)	Number of retail units
Brixton	TC2819	2346	818343	1725	450
Manchester	TC0152	15266	431037	566896	1603
Newquay	TC0702	1419	27403	20342	335
London New West End	Rectangular snapshot	4986	968325	Not available	600

¹¹ Mumford, C., Parker, C., Ntounis, N., & Dargan, E. (2020). Footfall signatures and volumes: Towards a classification of UK centres. Environment and Planning B: Urban Analytics and City Science. <https://doi.org/10.1177/2399808320911412>

It is unlikely that our figures from 2015 for the number of retail units are accurate. Instead, the purpose of including this data is just to show how the case-study centres compare to each other. Manchester is the whole city centre and has the greatest number of businesses. London's New West End is part of the city centre and contains just part of the offer (around 10%). Brixton is another London district, slightly smaller than the New West End. Newquay is a seaside town, with the smallest offer of all our case-study towns.

Likewise, the population data included is provided for comparison purposes, rather than an accurate count of the exact number of people in the areas defined. For example, there are 35 times the number of people living around London New West End than there are living around Newquay.

To provide additional contextual information to investigate the recovery of each of the case-study towns we have included footfall data for August, from the High Streets Task Force Advanced Dashboards that are available for the four case-study towns.

7.1 Brixton

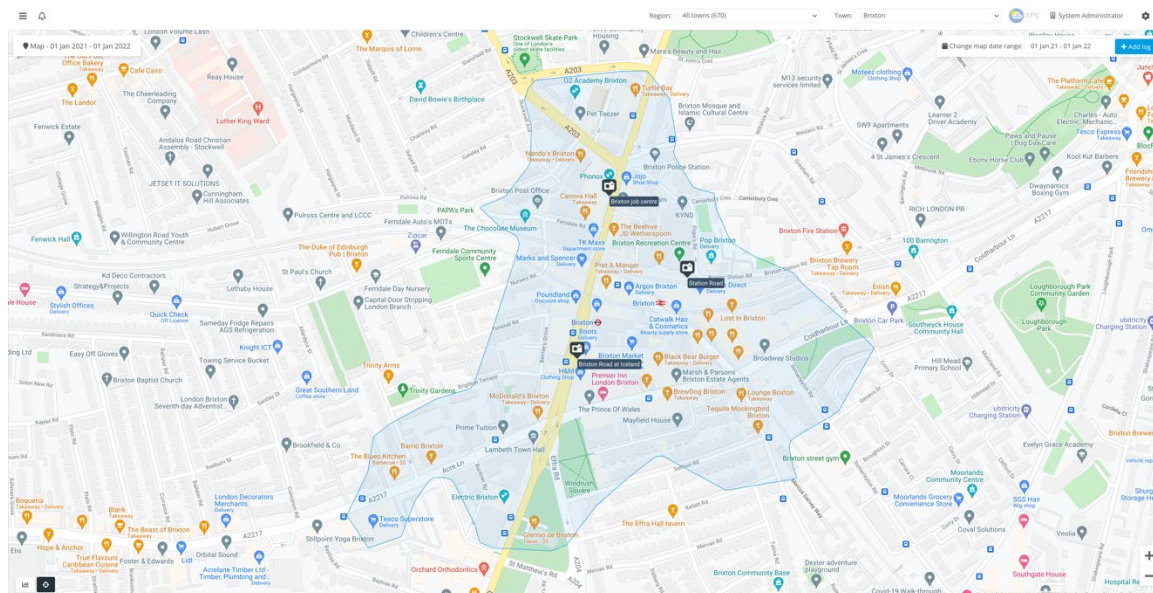


Figure 21: Map of Brixton showing town centre boundary (identified by Consumer Data Research Centre). Source HSTF Dashboard/Google Maps. CDRC

Table 10: Brixton Data

Retail Centre ID (TC)	TC2819
Number of retail units in centre	450
Population in town centre boundary	2346
Population in 5 miles of town centre	818343
ONS Built Up Areas (2011 Census)	1725

Brixton was classified as Speciality Town in 2019. Speciality Towns have a good mix of heritage, culture and other attractions that are popular for people visiting – but they also serve their local community effectively. In 2019 Brixton's volume of footfall corresponded to that of a Major City.

It has a Saturday Peak weekly signature, reflecting the high number of locals and visitors that are attractive to the cultural, hospitality and retail offer on Saturdays. Brixton also had an All-day Economy – reflecting the importance of the evening and night-time economy.

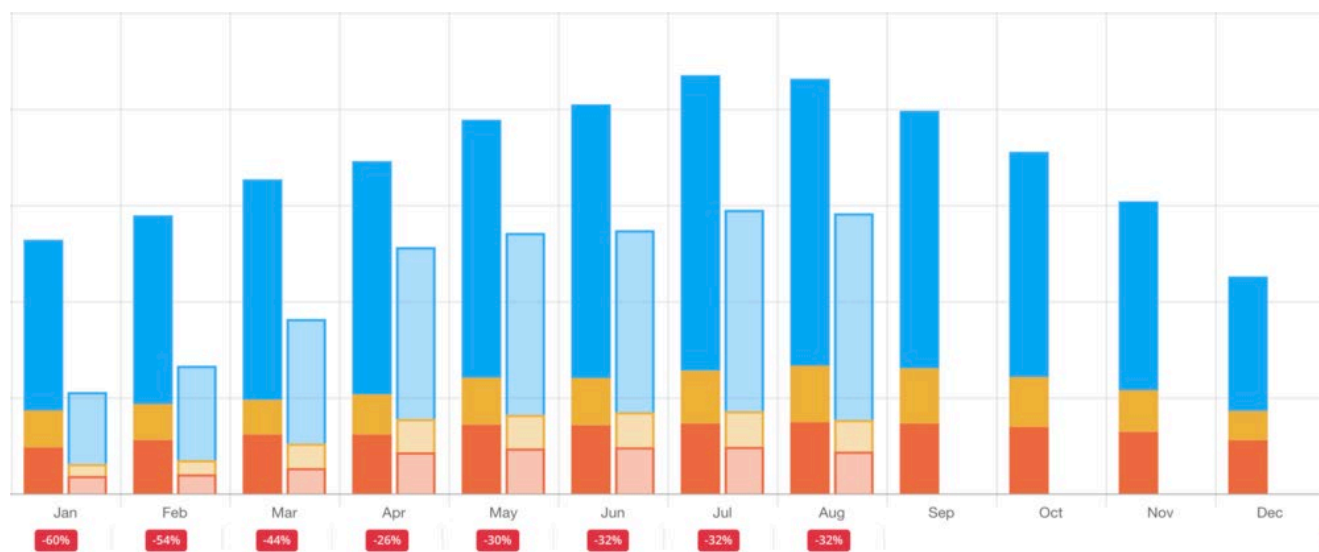


Figure 22: Comparing 2019 footfall (left hand bar) with 2021 footfall (right hand bar) in Brixton. Note – the different colours relate to different footfall counters in the town.

Our clustering analysis identifies Brixton as a recovered town. Whilst footfall in August was still nearly one third down on 2019 levels, the signature for 2021 (Figure 22) follows a similar pattern as 2019. This suggests that the overall function of Brixton as a Speciality Town has not changed, but that certain uses or attractions in the town continue to be impacted by COVID – in this case it is likely to be a reduction in the number of people coming to work in the location as well as international visitors.

Daytime footfall (6 am to 6 pm) in 2021 is 34% lower than in 2019 (for the period 1st Jan – 30th September). However, the number of people using evening and night-time attractions (6pm – 6am) is even lower – 56% lower in 2021 compared with the same period in 2019 (1st Jan to 30th September). This could also be due to a reduced number of evening and night-time attractions, as these operators have been severely impacted by the pandemic. The evening/night-time economy is important to Speciality Towns as it represents an important part of the cultural/leisure/hospitality offer (e.g. live music, theatre, bars and nightclubs etc.)

To gain more insight into Brixton's recovery we interviewed Gianluca Rizzo, Director of Brixton BID and of Stratford Original BID. Gianluca is a place management specialist with extensive experience in the BID industry. He holds an MSc in Geography from UCL and a BA in Sociology from the University of Milan. Gianluca is a Fellow of the Institute of Place Management, a Fellow at the Royal Society of Arts, Manufactures and Commerce (RSA) and a founding member of The BID Foundation, one of the partners of the High Streets Task Force.

What changes to footfall patterns have you noticed and what additional insight do you have to interpret the HSTF analysis undertaken?

Brixton is a destination by day and night. Since the start of the pandemic, the day-time economy has not been significantly affected with data showing that Brixton was still performing better compared to other areas within London.

The most significant reduction Brixton has experienced has obviously been related to footfall after 6pm which is linked to the impact the pandemic had on our distinctive night-time economy. Our data shows that 41% of the local spend (estimated at £2b per year) occurs after 6pm.

In order to better guide our local recovery plan¹² (Restart Brixton) and move the local economy from a state of recovery to performance, we have recently commission a new piece of work founded on data. Currently, we collect movement data, spend data as well as social media sentiment data. Professional place management relies upon on informed decision making – and this includes data on all aspects related to a place.

Data from multiple sources support our decision making but moreover, data helps us monitor the impact of our initiatives. COVID has brought the need to monitor and evaluate into sharp focus. Being able to accurately measure and adapt our plans quickly means we can support the businesses and the wider Brixton community more effectively.

What have been the main components of your recovery strategy?

Restart Brixton is our local recovery strategy. It aims at attracting existing and new audiences by creating a safe, welcoming and attractive environment for all. Our strategy focusses on positioning Brixton as a distinctive destination; attracting the right level and quality of investment and funding; promoting Brixton as an equal, inclusive and open place to do business and working in partnership to maximise opportunities.

There are 7 key elements in our vision:

1. **Data-led;** To inform the next steps for our economy, Brixton needs to identify its area and businesses' needs and define initiatives with evidence-based information. By working with data, we will be able to quantify the value of the local economy (both daytime and night-time).
2. **Sustainable:** Building on our 'Brixton Playground' vision, we support a walk and cycle-friendly Brixton. A green local agenda will be key to the economic recovery thanks to the shift to hyper-localism.
3. **Activation:** Activating spaces will be critical for the future of our economy. We want to see more infrastructure that will assist our partners in activating key spaces such as Windrush Square by providing seating, parklets, outside dining, events, animations, and more.
4. **Safer & Hyper-local;** Promoting Brixton as a safe place for everyone to enjoy. Building consumer confidence and maximising the benefits from the hyper-localism trend.

¹² <https://brixtonbid.co.uk/content/uploads/2021/04/RESTART-BRIXTON-VISION-FINAL.pdf>

5. **Cultural, creative and inclusive:** Celebrating Brixton as the place for culture, creativity and inclusivity. Showcasing our offer and attracting new and existing audiences.
6. **Delivering business value:** Making it easier to run a business in Brixton by providing practical help and support. Communicating relevant information and delivering initiatives for an effective and long-lasting recovery.
7. **Lobbying & Advocacy:** Campaigning for the interests of Brixton through our local, regional, and national networks. Focussing on severely impacted sectors (including our famous Evening and Night Time Economy) and demanding structural changes (Business Rates, Licencing, etc.) for the long-term recovery.

Primarily, our recovery and longer-term vision relies on partnership working with the London Borough of Lambeth as well as the Lambeth Business Taskforce Group which includes the other 6 Lambeth based BIDs.

How effective has your recovery strategy been? How do you know/measure this?

Early on in the pandemic we adopted the COVID-19 Recovery Framework, developed by the Institute of Place Management and The BID Foundation. This framework was subsequently promoted by the High Streets Task Force¹³ and was used to guide the recovery strategies of hundreds of towns and cities. We thought it important that our recovery strategy (restart Brixton) took us further than merely back to where we were before. Each of our themes identified within Restart Brixton have specific initiatives and budgets allocated. For each theme we are in a position to track the progress of the work as well as measure the impact. We are at the early stages of implementation and look forward to reporting our progress in terms of the KPIs we have set for the project.

To what extent do you think Brixton will have changed as a result of the pandemic? How are you managing or reacting to this change?

Brixton like any other place will need to adapt and evolve. The pandemic is only one of the external factors places are facing including the climate crisis, the implication of Brexit, how business is carried out and changes in consumer behaviour.

Some businesses are individually equipped to evolve and push through these challenging times. However, as a Business Improvement District our focus has to be managing and developing the collective improvement of the area. We are delivering a wider range of place initiatives focussing on more culture, better wayfinding, and improved street care. One flagship project we are in the process of launching is the pedestrianisation of a key central road.

For me, as a place leader, the pandemic is an opportunity to reimagine places by putting *people* at the centre.

¹³ <https://www.highstreetstaskforce.org.uk/covid-19/covid-19-recovery-framework/#:~:text=The%20Framework%20sets%20out%20a,for%20place%20leaders%20to%20adopt.>

7.2 Newquay

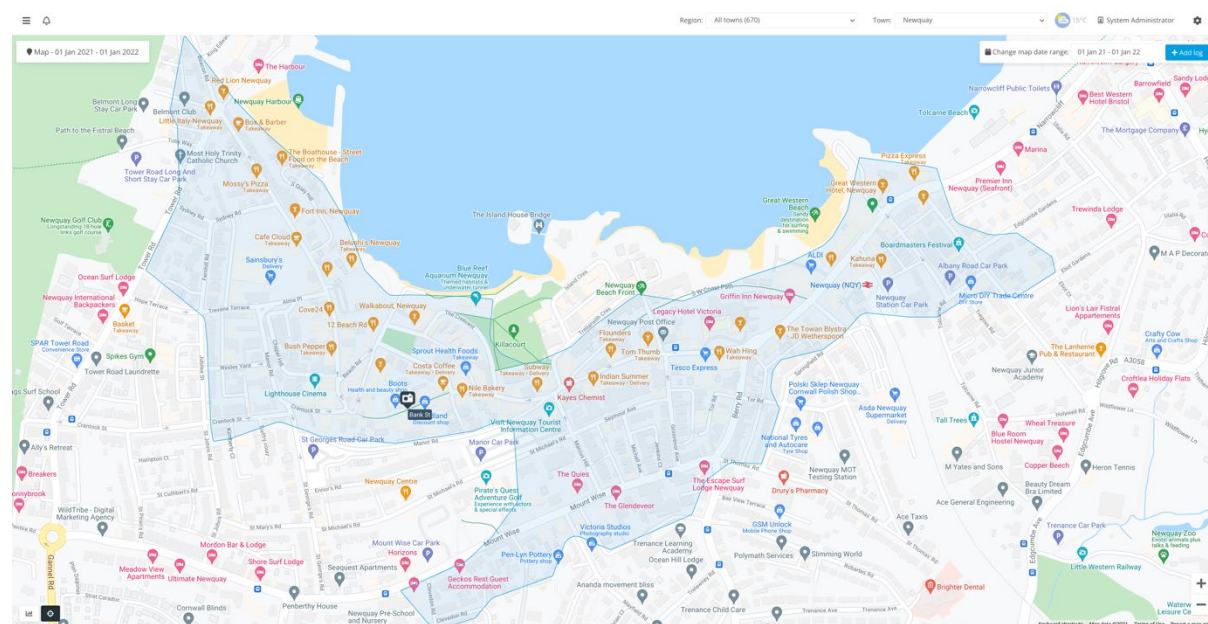


Figure 23: Map of Newquay showing town centre boundary (identified by Consumer Data Research Centre). Source HSTF Dashboard/Google Maps. CDRC

Table 11 : Newquay Data

Retail Centre ID (TC)	TC0702
Number of retail units in centre	335
Population in town centre boundary	1419
Population in 5 miles of town centre	27403
ONS Built Up Areas (2011 Census)	200342

Newquay was classified as a Holiday Town in 2019. Holiday Towns are visited by tourists, for overnight stays and also daytrips. Holiday towns are usually by the sea, with sandy beaches and are busiest in the summer. They do not always serve their local catchment very effectively, especially out of season.

In 2019 Newquay's volume of footfall corresponded to that of a Town in our activity hierarchy. It has a Saturday Peak weekly signature reflecting the attractiveness of the town for day visitors and shoppers on Saturdays. Newquay also had a Mid-day Economy – meaning people tend to use the town during the day rather than staying on into the evening or night-time. That is not to say there is no evening or night-time offer, but this is more likely to be enjoyed by holiday makers and locals.

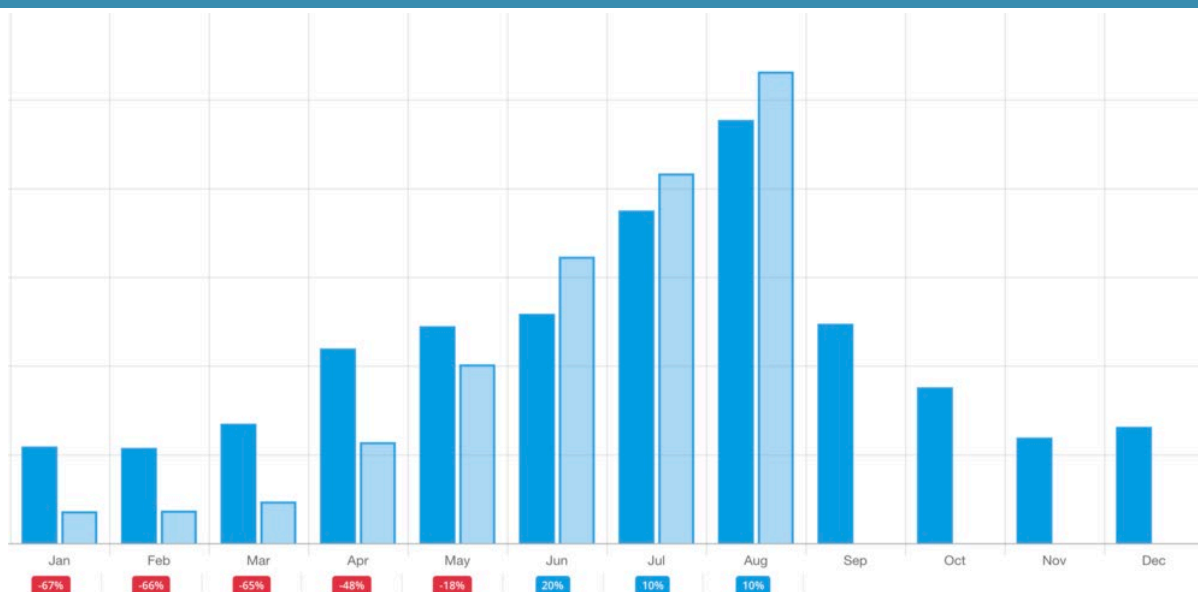


Figure 24 : Comparing 2019 footfall (left hand bar) with 2021 footfall (right hand bar) in Newquay.

Our clustering analysis identifies Newquay as a Summer Peak town – as to be expected for a holiday town that has maintained this function throughout the pandemic. Not only does footfall in 2021 follow the same pattern as 2019 (Figure 24) footfall volumes in June, July and August (2021) actually exceed those of the same period in 2019. The balance between the daytime and evening/night-time economy has not changed significantly. In 2019 83% of footfall was generated between 6am to 6pm with 17% between 6pm and 6am. In 2021 (January to September) 85% of footfall was generated between 6am to 6pm with 15% between 6pm and 6am.

This suggests that the overall function of Newquay as a Holiday Town has not changed, but, potentially, there are challenges associated with greater summer demand and disparity between usage and the offer of the town in the summer and winter months could become even greater.

To gain more insight into Newquay's recovery we interviewed Jennifer Dixon, a member of the Newquay Town Team and leader of their current town centre placemaking project. The Newquay Town Team (NTT) is a relatively newly formed group (Dec 2020) it is a partnership representing business, the community and local government. Jennifer is a registered architect with extensive experience in the urban regeneration field. She is accredited as a Client Adviser by the Royal Institute of British Architects. Her response is supported by Shirley Williams who manages the data and documents of the Town Team. Newquay Town Team is a Partner of the Institute of Place Management, the lead of the High Streets Task Force.

What changes to footfall patterns have you noticed and what additional insight do you have to interpret the HSTF analysis undertaken?

Newquay was very hard hit in all three lockdowns. The beaches were empty as people stayed home. The BBC News headlines of 16 June 2020 stated the Newquay was “The Town facing the greatest economic hit”. With over 50% (27% across Cornwall) of its workers employed in the tourist or hospitality sector, Universal Credit claims rose by over 1000%, foodbanks saw huge increases in requests for help and the town’s known shop vacancy rate rose from 8.6% to 13.9% (This may have been higher but with premises closed up it was hard to determine who may or may not actually open up at the end of the lockdown).

We only gained access to Springboard footfall data in April 2021 (with a HSTF Advanced Dashboard) but consider ourselves very lucky as the footfall monthly data has been collected since July 2012 giving us a long history for use in our modelling. It has been possible to build a better understanding of the town just through regular review and consideration of the footfall information on a regular basis.

As the HSTF research team have identified, Newquay is a “Holiday” town with a midday peak but we agree that our local expertise is needed to fully interpret the data. For example, in Newquay the incoming tide drives people off the main beaches twice a day and on to the high street, and this can be seen in the figure movement at the relevant times.

Averaged over the years that the footfall counter has been in operation (2012-2021), we see the same peaks and troughs in footfall and the data is useful to be able to predict increases in numbers (which can double in the first 6 weeks of the summer and then fall back just as quickly). This information helps the local town council plan for the peak and to get finances committed to handle the peak, which is usually the middle weeks of August.

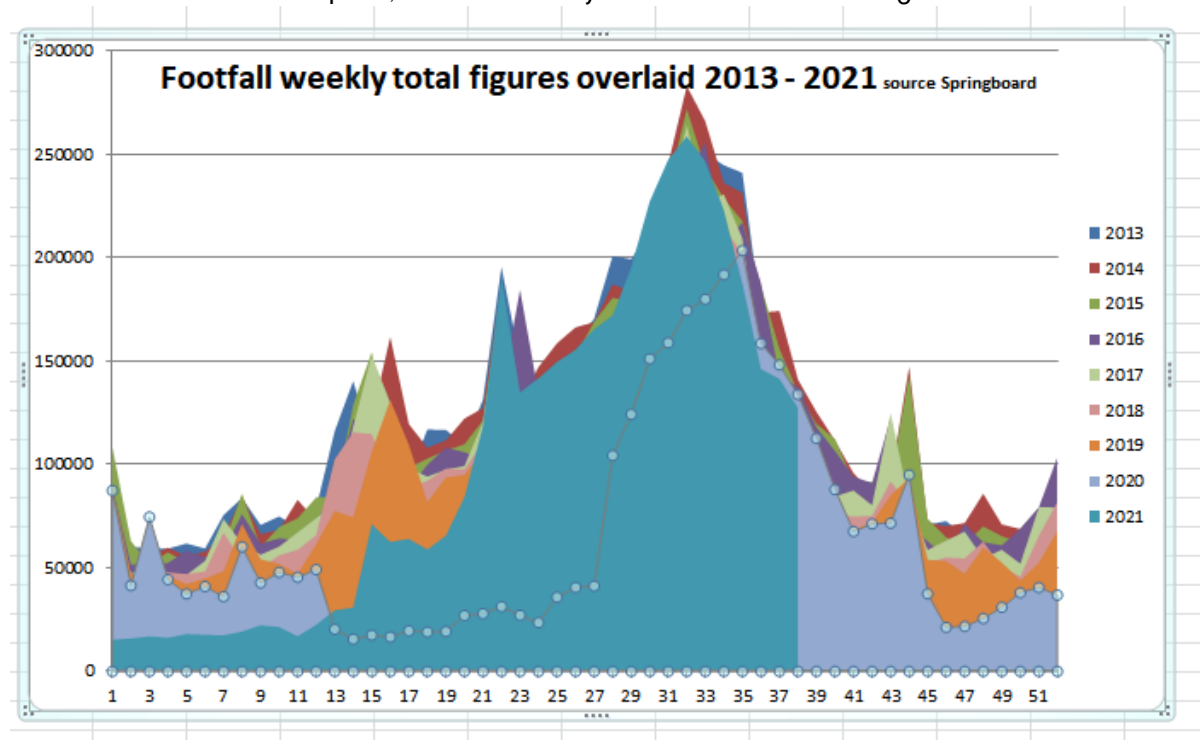


Figure 25 : Weekly footfall 2013-2021 (Source: Newquay Town Team)

In summer 2021, the Springboard data allowed us to predict the highest footfall numbers since 2014 and to prove (what we thought we saw on the ground) that the daytime footfall numbers had greatly increased although the night-time economy was decreased. This is in line with the town's strategic aim to address (and find ways to reduce) some of the more problematic aspects of the night-time economy for a better quality of life for its town centre residents.

One of the key aims of Cornish towns is to lengthen the holiday season and flatten the footfall peak, so that demand is spread in a way which means the town (both in terms of physical infrastructure and staff) can 'cope'. 2021 was particularly difficult given the need for social distancing and many staff having to isolate.

Daily signature

Newquay is a holiday town and has little early morning activity. We are aware that the late start of the night-time economy due to Covid restrictions in 2021 has kept the overall daily figures below the historic peak (2014). However, we were surprised by the relatively small percentage of evening/night-time footfall difference between 2019 (17%) and 2021 (15%), it felt much more reduced. We used our Advanced Dashboard supplied by the HSTF to understand these figures more. Within the dashboard we configure our own day, evening and night-time economies. We identify daytime as from 9am to 5pm and evenings from 5pm to 8pm and night-time as after 8pm. This is very important, because the 5-8pm figures are driven by beachgoers staying in town to use the restaurants and bars after a day of leisure, while the post-8pm figures reflect people choosing to come into the town centre specifically to access the hospitality offer.

The HSTF analysis in this report uses a standard daytime (6 am to 6pm) and evening/night-time (6pm to 6am). It is a very useful function in the HSTF Advanced Dashboard that allows towns to adapt their dashboard to reflect their own local daytime, evening and night-time economies. Using our time configuration evening/night-time footfall represents 24% of footfall in 2019 and 23% in 2021 – much higher than the figures provided by the HSTF in this report. This is because our evening economy in Newquay starts at 5pm not 6pm. The use of a standard 6pm-6am evening/night-time economy also 'hides' the split between evening and night-time economies. Our NTT analysis shows there has been quite a considerable change in this split from 2019 to 2021 as shown in Table 12.

Table 12 : Evening and night-time footfall split (2019 and 2021)

	2019 (% of total Evening and Night-time Footfall)	2021(% of total Evening and Night-time Footfall)
Evening	48%	55%
Night-time	52%	45%

There has been a drop in night-time footfall (from 52% to 45%) and a relative increase evening footfall. This is people coming into town to use the new increased restaurant capacity of the town with new openings along Fore Street such as Cove 24, the new harbour side beach restaurant, and speciality offerings such as Kahuna at the east end of Town which has attracted national media attention. It may be that the improvements in restaurant provision have compensated more than we thought for the slow opening of the night clubs in the season, and it will be interesting to see if this is a one-year trend or continues into 2022.

The evening and night-time economy is a valued contributor to Newquay's character, vibrancy and prosperity - the aim is to support its positive impacts and manage some of the inevitable negative ones. In terms of negative impact to the town centre, the night-time economy (and the late-night part in particular) seems far more significant than the overall percentage suggests, maybe because it causes noise, disruption and litter, and wear & tear on the town centre and cleaning regimes. The fall in night time footfall 2021 from 2019 seems to have reduced these negatives disproportionately, which is good news - our proposed insight group for the Newquay hospitality industry may shed some light on the reasons for this.

Weekly signature

The location of the main Newquay footfall counter at the pedestrian access to the popular Towan Beach (accessed via the high street) probably has the effect of flattening the Saturday peak from what it might otherwise be. Saturday being holiday village/caravan changeover day means that there are likely fewer 'weekly holiday' visitors in the high street, however there are probably more day trippers to the beach and local users of the high street on that day. As well as the tidal pattern mentioned above (which of course varies each year for a particular week), the weather tends to disrupt the weekly pattern, typically holiday makers from quite a wide radius in Cornwall visit the Newquay high street when it is raining/too windy for outside activities. So, in short, the weekly footfall figures in summer actually hide a plethora of variations to both numbers and customer type which are quite specific to Newquay and which the high street businesses have learned to predict.

Annual signature

The averages and month comparisons provided by the HSTF mask some fairly substantial variations in Newquay. For example, half of the month of July 2021 had low footfall and half had high footfall. Our local interpretation of bounce back was, therefore, different from that which could be seen when examining the data at a national "removed" level.

What have been the main components of your recovery strategy?

There have been numerous proactive efforts to make the town as attractive and functional as possible to visitors and residents in the immediate term including:

- Engaging visual interventions e.g. new murals and planting
- Increased attention to cleaning and maintenance of the public realm
- A new 'park and ride' for summer 2021 to ease congestion and parking in the town centre
- Upgrade of one of the key public spaces of the town to host events and accommodate large numbers of visitors in peak periods, including a distinct 'incubator' retail offer and external performance space
- Establishment of a Town Team to support town council and unitary authority, and to engage the whole community in planning & implementing mid- and long-term improvements to keep pace with evolving opportunities and trends

- Individual businesses have taken advantage of the ‘down time’ provided by the lockdowns to significantly improve their premises, which indicates community and business confidence in the town

How effective has your recovery strategy been? How do you know/measure this?

Newquay’s recovery through 2021 has been phenomenal. The independent stores used the early months of 2021 to revamp and alter/re-decorate their premises and build in as much outdoor space/activity as they could. These were opportunities not usually available on-block as the town has relatively few weeks between peaks in which to recover, relax and plan for change. New technologies were taken on board with cashless payment available almost everywhere and pre-ordering from tables another innovation widely adopted.

A whole new way of working emerged alongside the harbour in 2020 when the relatively small beach restaurant became a multi-vendor street food area often selling the sea food supplied direct from the adjacent harbour. This model was expanded in 2021 and now looks set to continue into the future.

Newquay’s natural assets of the sea, the open headlands and wide beaches have drawn the tourist back to Cornwall and Newquay as the staycation has gripped the UK. People who have never been to Cornwall have now seen what the county has to offer, and we hope their appreciation of the Cornish way brings them back in future years when second holidays are considered alongside their normal oversea “sun seeking” excursion. Activity based companies have also seen a huge growth in bookings as people experience the sea in differing ways.

As the footfall data shows, Newquay has not had a retail anchor for many years although people do seek retail and other indoor experiences when the weather is poor. Activity and experiences are definitely the main anchors for the tourist and visitors at the expense of local residents, many of whom tend to avoid the town centre during the peak times. Balancing the needs of residents during the peak season and/or creating the ability to switch to a destination for locals out of season is one of the issues that are exercising the minds of the Local Council, BID and Newquay Town Team.

Until the season ends and all of the numbers are in for analysis, it is impossible to fully understand how well Newquay may have recovered but our vacancy rates are nearly down to 2019 levels, and even now other larger properties in town are being occupied and we expect the rate to drop further.

Table 13 : Provisional vacancy rates (Newquay). Source Cornwall County Council

2019	8.5%
2020	13.9%
2021	8.6%

Throughout the summer school holidays there was not a bed to be found in town and many struggled to book to eat out in the evenings. Beaches were packed to capacity and money has

flowed into the local area. We have seen more daytime visitors than we have since the early footfall year records. Newquay has an upbeat feeling and a new belief that when asked it sets up and performs as a visitor destination for the tourist and as a community for the resident.

To what extent do you think Newquay has changed as a result of the pandemic? How are you managing or reacting to this change?

The weather has been good, so people have been able to take advantage of the outdoor seating. Labour has been tight which has restricted capacity and at time, visitors have found it difficult to book to eat out. This aspect of the holiday town experience has changed as people now stay in apartments/ Airbnb and they expect to eat out rather than in their hotel.

Newquay's hotel bed capacity has fallen considerably over the last few years. COVID has been the main limiting factor in 2021 as it has restricted the staff numbers available although this may also have hidden an underlying shortage of staff which will re-emerge in the 2022 season.

Footfall numbers have exceeded 2019 figures over the summer period; one of the measures of success will be whether the footfall figures increase in the shoulder months of May/June and September/October relative to 2019 and previous years. The long-term objective is to significantly increase footfall in the shoulder periods.

It is expected that the permanent population of the town may increase faster than it might have done without the pandemic, owing to the revolution in remote working coupled with the undoubted lifestyle attraction the town offers. The new urban extensions initiated before the pandemic (including Nansledan) are able to support this acceleration in terms of prospective home buyers. The results of the recent census (expected March 2022?) will reveal much, however the anecdotal evidence suggests that:

- there is an increasing trend towards couples with young families choosing Newquay as their long-term home. This in turn seems to be creating a community which is making it more attractive for younger people (who don't yet have families) to stay rather than aspire to leave, and new ones to arrive (some working for regional/national firms from a Newquay base). This is supported by a new generation of agile workspaces such as C Space, a multi-use performance, event and co-working venue in the town centre. Much depends on the re-establishment of the air service and the improvement of the rail service as to whether this trend is sustained.
- However this trend is threatened by the increased demand for holiday accommodation driven by the pandemic, which is reducing the amount of private rental sector accommodation in the town to critically low levels, making it very difficult for younger residents who want to rent 'year round' and greatly exacerbating an already challenging trend. Cornwall County Council is considering remedies through licensing, but until then it will inhibit the potential offered by the town to this age group
- It appears that the vacancy rate in retail premises has dropped as a result of the pandemic. Whether this translates into an increased number of viable year-round

businesses remains to be seen. There are still a number of traditional high street businesses which take up frontage but become dormant in October – May period.

- Newquay is known for its international mix of young workers in the watersports, hospitality and media industries. The dramatic reduction in young working people from overseas (pandemic and Brexit) has affected the hospitality business, with several unable to open fully during the peak seasons, or to maintain an adequate service during the start of the shoulder season. Even if workers can be found from elsewhere in the UK, there is nowhere to accommodate them.

A significant aspect for consideration is the relationship of Newquay to that of the other towns in Cornwall, and the potential to use footfall signatures as differentiators in planning/management terms. Unlike most other counties, Cornwall has several towns of near identical population size rather than one or two larger regional centres. In 2017 the following 6 towns were broadly commensurate in size, with Newquay being second largest.

Table 14 : Population Figures for 6 Cornish Towns Source: ONS 'Parish Population estimates for mid 2002 to mid 2017 based on best-fitting of output areas to parishes

Truro	20013
Penzance	20973
St Austell	21054
Newquay	22074
Camborne	21975
Falmouth	23061

It seems likely that the Nansledan urban extension may have already caused Newquay to overtake Falmouth to become the largest town in Cornwall in 2021. The 'Comparison' town of Truro was slightly smaller than Newquay in 2017, but a major expansion is planned and it is treated as a regional centre, drawing a regional catchment, and is consequently of different character from the high streets of the other similarly sized towns. Because of this rather 'flat' hierarchy' in terms of population size, the approach to classifying the 6 largest Cornish towns could be driven by footfall signature, and this should be considered at a County level to achieve a sustainable balance – each town has its own 'specialties' which may need to be identified & reinforced, including Truro's position as an important regional centre with the necessary 'comparison' offer for Cornwall.

7.3 Manchester

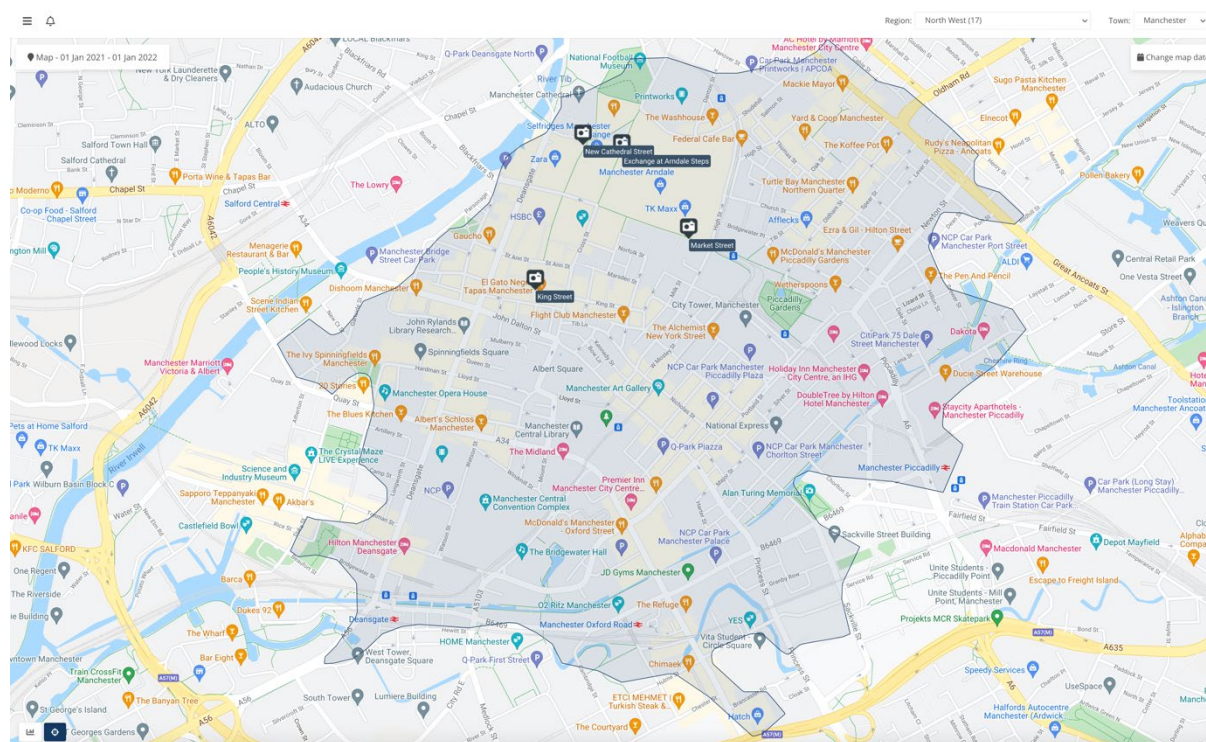


Figure 26 : Map of Manchester showing town centre boundary (identified by Consumer Data Research Centre).
Source HSTF Dashboard/Google Maps. CDRC

Table 15 : Manchester Data

Retail Centre ID (TC)	TC0702
Number of retail units in centre	1603
Population in town centre boundary	15,266
Population in 5 miles of town centre	431037
ONS Built Up Areas (2011 Census)	566896

Manchester was classified as Comparison Town in 2019. Comparison Towns are the country's largest cities and towns; as well as being centres of employment and education etc. They are characterised by a very strong retail offer. In 2019 Manchester's volume of footfall corresponded to that of a Major City. It also had a Saturday Peak weekly signature, reflecting its importance as a regional shopping centre – with higher number of visitors coming to shop and enjoy the leisure and hospitality attractions on a Saturday. Manchester also had an All-day Economy – reflecting the importance of the evening and night-time economy.

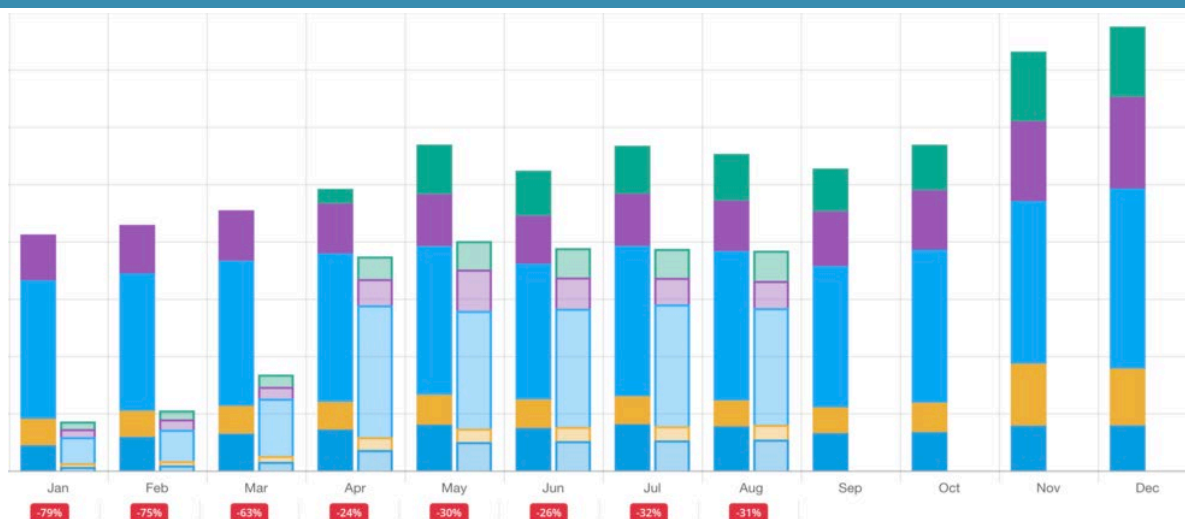


Figure 27 : Comparing 2019 footfall (left hand bar) with 2021 footfall (right hand bar) in Manchester. Note – the different colours relate to different counters in the town.

Our clustering analysis identifies Manchester as a Reduced Town. Footfall in the early part of 2021 was significantly reduced, just 79% of 2019 levels in January and 75% of 2019 levels in February. In August footfall had recovered to two-thirds of footfall volumes in August 2019, but the signature for 2021 (Figure 27) may not be following the same pattern as 2019. July and August 2021 footfall levels are below those of June 2021, whereas in 2019 July and August had higher levels of footfall than June 2021. Manchester is popular with international tourists and ongoing travel restrictions will impact on footfall over the summer. Other uses or attractions in the city continue to be affected by COVID. Comparing 12 weeks of footfall since restrictions were lifted with the similar period in 2019 shows that the city is quieter on weekdays as Table 16 illustrates.

Table 16 : Reduction in footfall (April 18th 2021 – 19th September 2021 compared with same period in 2019)

	Reduction in footfall 2021 compared to 2019
Monday	16%
Tuesday	17%
Wednesday	16%
Thursday	17%
Friday	17%
Saturday	10%
Sunday	7%

However, the impact on the daytime and evening/night-time economy is fairly equal. During 2021 (January to September) daytime footfall (6am – 6pm) has been 60% lower than the same period in 2019 and evening/night-time footfall (6pm – 6am) has been 63% lower.

It is too early to know if the function of Manchester is changing from a Comparison Town – as it is the footfall in November and December that dictates this particular classification. However, as footfall levels on Saturdays are now 90% of pre-pandemic levels it suggests that the city is still attracting shoppers from its regional catchment, as a Comparison Town would. Nevertheless, our clustering analysis identifies Manchester as a Reduced Town which suggests the impact of the pandemic on Manchester may signify a need to actively manage more transformative change in the city such as a reduction in commercial office use.

To gain more insight into Manchester's recovery we interviewed Vaughan Allen, Chief Executive of CityCo which manages Manchester's Business Improvement District. Vaughan is a 21st century city centre manager with extensive experience in events and marketing. He holds an MBA from the University of Bradford and is a Fellow of the Institute of Place Management. Manchester BID is a member of The BID Foundation, one of the partners of the High Streets Task Force.

What changes to footfall patterns have you noticed and what additional insight do you have to interpret the HSTF analysis undertaken?

Footfall sensors in the city centre are in the main retail area, so closely reflect the opening and closing of retail during the period. With re-opening in April, we saw a surge of returnees (classic 'pent-up demand'), but this soon settled back down. For a city like Manchester, the cumulative impact of a lack of major business events, gigs and crowds at football further reduced numbers already low because of an absence of office workers, settling at around -30% footfall against 2019. Within that, though, there were some variations—the pure retail area on Market Street ran at higher footfall (-15% roughly against 2019) and continues to do so. As the report says, Saturdays are 10% down (and some specific Sundays are out-performing 2019)—the impact of missing office and event footfall is less pronounced at the weekend. For other sensors, the lack of office footfall is more telling; but often in areas where footfall is not directly linked to spend. For example, King Street footfall is almost 50% down, representing its function as a thoroughfare, but many of the businesses on King Street (high-end retail) are doing very well.

We collect spend data in great detail. This has given us a lot of information about the decoupling of footfall and spend. We have seen ATVs (Average Transaction Values) rise substantially, and overall spend rise alongside. August, for instance, still saw overall footfall at -29% on 2019 figures, but total spend was at +6% against 2019. We have regularly been running -30% on the number of transactions in the city centre economy, which matches the reduction in footfall, while running only slightly down on overall spend. This reduction in transactions possibly represents the 'coffee and sandwich' economy identified by the Zoomshock report¹⁴ and supported by office workers—lots of very small transactions that have little overall impact on total spend.

We also analyse the origin postcodes of visitors to the retail core. During the Covid period, the majority of footfall was from city centre residents and from a very local area. This has gradually changed as more people are visiting Manchester. Hotels have had very good weekends, but not

¹⁴ Gianni De Fraja & Jesse Matheson & James Rockey, 2020. "Zoomshock: The geography and local labour market consequences of working from home," Discussion Papers 20-31, Department of Economics, University of Birmingham. <https://ideas.repec.org/p/bir/birmec/20-31.html>

so good weekdays since July (demonstrating the success of the staycation model even for city breaks). Footfall from London and the rest of the UK outside of a one-hour drive time has gone up from 13% of the total in April to 22% in July—and against higher overall footfall numbers. We also monitor transport flows, hotel occupancy and employment vacancies. And, of course, development plans. It is helpful to have a variety of data sources to understand the changing nature of the city – however this data also needs to be interpreted and disseminated. The understanding and sharing of data are key roles of the BID and city centre management team in Manchester. It is important that this sort of analysis is done by people who do understand the local context.

The data and data sources we use in decision making need to be regularly reviewed and limitations understood. The five footfall sensors in the city centre are all in the core retail area. It is inevitable that they show very low figures when retail was closed (albeit there is still a role in this location as a thoroughfare). Equally, of course, it might be that footfall in pure office areas such as Spinningfields (which does not have a footfall counter) is actually lower than shown in the footfall.

The concentration of footfall counters in the retail area is also likely to under-represent the evening and night-time economy in the city. Apart from on King Street, there is little of a night-time economy covered across the existing counter network, so footfall overnight will be mostly using the space we monitor as a thoroughfare. Footfall counts overnight are pretty small and will not capture the significant evening/night-time economy of areas such as the Northern Quarter.

What have been the main components of your recovery strategy?

We've been focused on a number of strands—an enhanced events programme to attract back into the city centre people who haven't visited for over a year. This is to remind them of the vibrancy and value of city centres.

Alongside, we're supporting businesses in the ways they need to operate in the current climate—we worked very closely with the city council on ensuring the largest range of outside areas for hospitality businesses of any city in the country. Currently, we're working on the issues around vacancies in the hospitality sector and trying to find both long-term and short-term solutions there.

We are working with partners on encouraging office workers back to the city centre. We work alongside the city council and with other business organisations such as the Chamber, Pro-Manchester, etc.

How effective has your recovery strategy been? How do you know/measure this?

We know that spend has been holding up, that the immediate issues around employment levels in the NTE have eased a little. We've seen from our stats that the percentage of people coming back into the city centre from places like West Yorkshire and Cheshire has increased substantially in the past few months.

NTE businesses have substantially altered business plans to often continue with table service and to deal with the lack of staff and use delivery services. They are often open fewer nights, but charging more. Footfall is still important, but far less than it was—and much of the NTE is doing as well as it was in 2019, if not better. August 2021 sales were well up on those in 2019 even in mass-market establishments.

We are now better able to see the nature of the correlation (or lack of it) between footfall and spend. For big city retail economies like Manchester, a large amount of retail is based on single high purchases. Footfall has little impact on this. We know the jewellery sector, for instance, has had an excellent last six months as discretionary spend goes on luxury items rather than holidays. This would not be the same in a local high street where footfall might have a much stronger correlation with the success or the lack of it of local stores.

To what extent do you think Manchester will have changed as a result of the pandemic? How are you managing or reacting to this change?

The pandemic has speeded up processes that were already under way. The previously gradual change from retail to hospitality and experiential has increased fairly rapidly. Changes in hospitality business models to delivery and to be more service-focused have gained ground. We are ever more aware of the need to sell the city centre as a place to visit and to work.

Footfall is a useful indicator but is not, on its own, an effective a marker for economic success. While footfall can help track movement and changes in activity levels, we will want to reflect on other data (occupancy, spend, development plans, discussions with landlords and tenants) before we assume continued drops in footfall might need to lead to changes in planning and use in the city centre.

7.4 London New West End

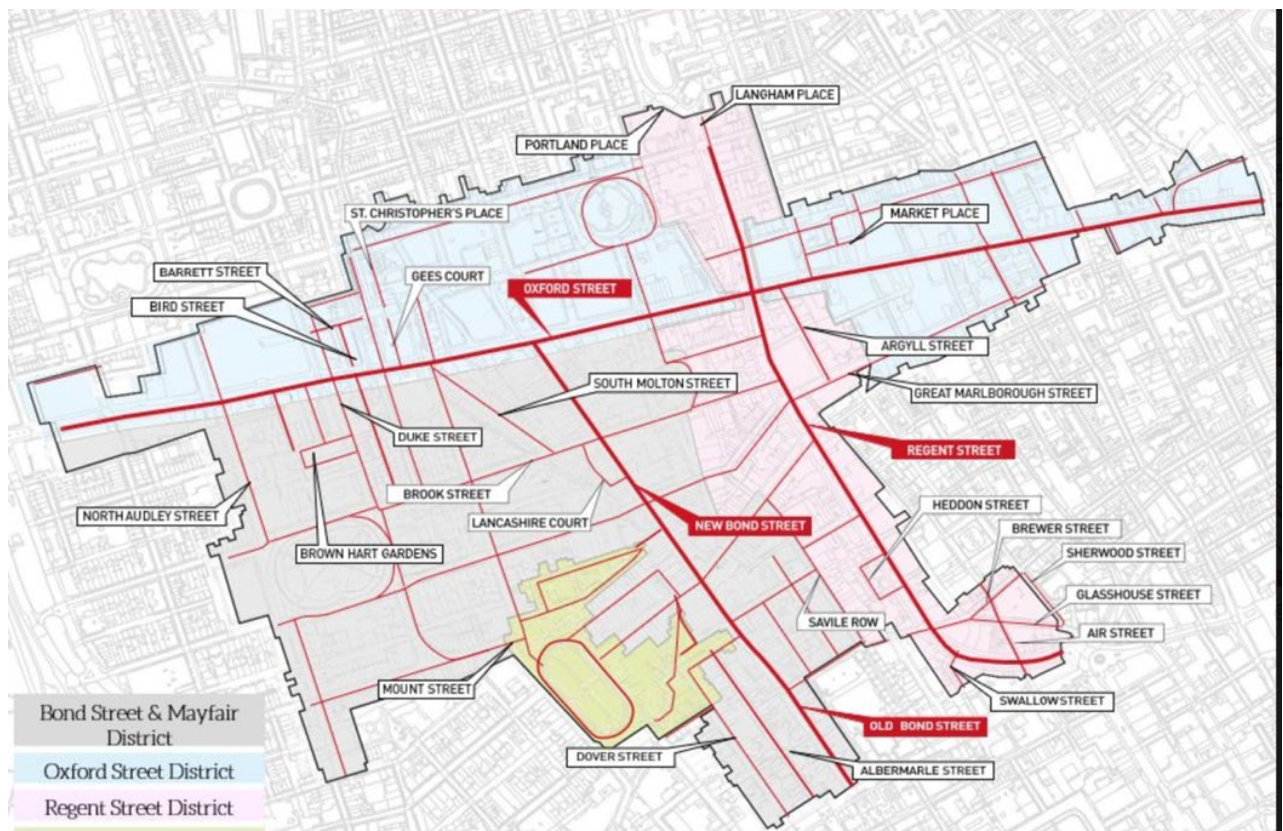


Figure 28 : Map of London New West End area: Source New West End Company

Table 17 : London New West End Data

Retail Centre ID (TC)	N/A (Part of London Central)
Number of retail units in centre	600
Population in BID area boundary	4986
Population in 5 miles of BID area	968,325
ONS Built Up Areas (2011 Census)	Not available

New West End was classified as Multifunctional Town in 2019. Multifunctional Towns have a mix of attractions – employment, culture, leisure, retail. In 2019 the New West End's volume of footfall corresponded to that of a Major City. It also had a Saturday Peak weekly signature, as to be expected for the UK's most important retail destination, attracting visitors from across the four nations (and from further afield). The New West End also had an All-day Economy – reflecting the importance of the evening and night-time economy. In 2019, New West End was the most visited place in the whole of the UK, with footfall being driven by a combination of shoppers, residents, workers, and tourists.

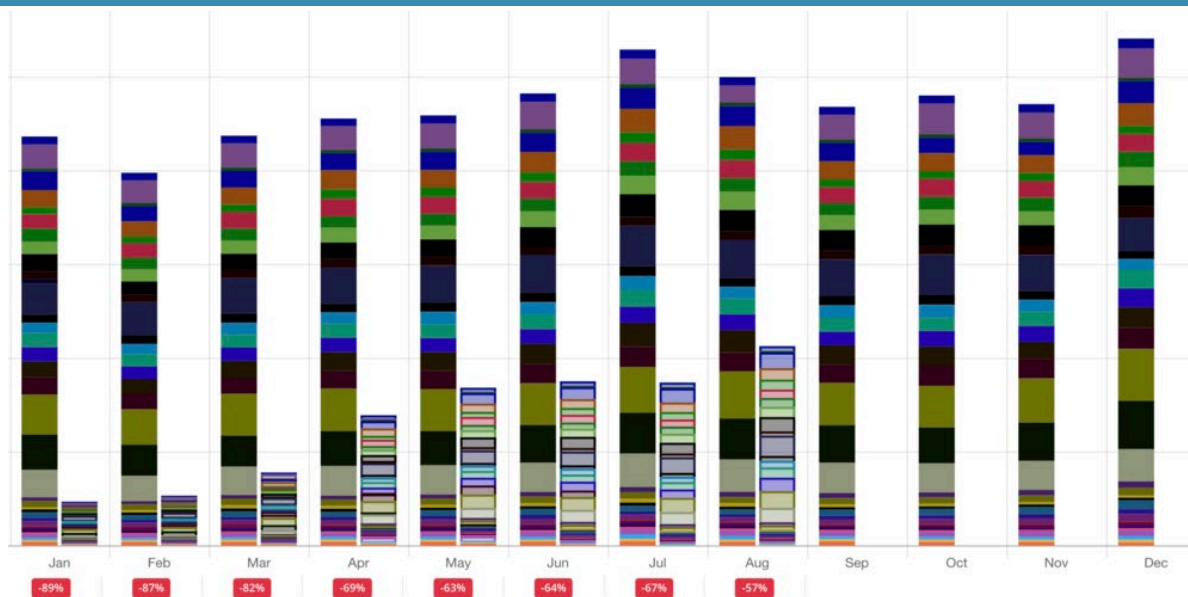


Figure 29 : Comparing 2019 footfall (left hand bar) with 2021 footfall (right hand bar) in London New West End. Note – the different colours relate to different counters in the town.

Our clustering analysis identifies New West End as a Much-Reduced Town. Footfall in the early part of 2021 was severely impacted, just 89% of 2019 levels in January and 87% of 2019 levels in February. In August footfall was still down over more than 50% of 2019 levels, but the signature for 2021 (Figure 29) may not be following a similar pattern as 2019. In 2019 July was the second busiest month, after December. However, in 2021, August was busier than July. This is likely to be the result of more national visitors (rather than international ones – as international tourism continues to be adversely affected due to ongoing COVID travel restrictions).

The balance between the daytime and evening/night-time economy has not changed significantly. In 2019 72% of footfall was generated between 6am to 6pm with 28% between 6pm and 6am. In 2021 (January to September) 73% of footfall was generated between 6am to 6pm with 27% between 6pm and 6am.

The New West End may not be changing from being multifunctional– but perhaps a prolonged absence of international visitors may bring some quite fundamental changes to the area?

To gain more insight into New West End’s recovery we interviewed Jace Tyrrell, Chief Executive of the New West End Company, the area’s Business Improvement District. Jace has over 20 years place management and retail experience. He is an alumnus of the Senior Executive Programme at the London Business School and holds a Bachelor of Communications from Griffith University. Jace is a Member of the Institute of Place Management. The New West End Company is a member of The BID Foundation, one of the partners of the High Streets Task Force.

What changes to footfall patterns have you noticed and what additional insight do you have to interpret the HSTF analysis undertaken?

Footfall in the area has been severely impacted by COVID. We have a fairly small resident population in the BID area so as a destination and important commercial area our offer is predominantly for people that are travelling some distance to the area. Fewer international visitors, homeworking and reduced levels of public transport usage mean that footfall is still around 60% down on 2019 pre-pandemic levels.

The reduction in international visitors has meant July, in particular, was quieter than in previous years. On the other hand, we have seen higher numbers of domestic visitors, especially in August and September this year.

The pandemic has affected footfall numbers across our daytime, evening and night-time economies in a fairly uniform way. In August our daytime/night-time split had returned to pre-pandemic levels. 72% of footfall was 6-6 and 28% was 6pm to 6am.

We invest around £1m a year in data to gain an accurate understanding of who visits the area, where they come from and what they spend. We have a lot of high-end retail in the area where average transaction values are very high. One shopper might spend thousands of pounds in a jeweller, for example. In a different centre, dominated by convenience shopping, you would need hundreds if not thousands of shoppers (footfall) to generate the same amount of spend. Whilst footfall has been down, spend has been more resilient. Especially since restrictions were abolished in July. Spend has recovered to 60-70% of pre-COVID levels,

We also monitor transport usage. Public transport usage is still only around 2/3rds of pre-COVID levels. Some of this reduction is because office usage is down. From our conversations with employers only about 30% of the workforce has returned to the office, on any given day. Tuesdays, Wednesday and Thursdays are popular 'office' days – and office workers appear to be using surrounding shops and services, spending similar amounts to when they were in the office five days a week.

Before COVID around £10bn per annum was spent in London's New West End, with half of that being generated by international visitors. Ongoing travel restrictions have obviously severely impacted the amount of international spend in the area. National visitors spend 75% less than their international counterparts.

What have been the main components of your recovery strategy?

The immediate priority for the BID was to rebuild customer demand, local and global support and the recapitalisation of business. Our objective is quite simply to return the local economy to pre-pandemic levels *in a sustainable way*. This was explained in our five-year strategy¹⁵ to our levy payers and wider stakeholders, when we went for re-ballot early in 2021. This includes a three-pillar delivery plan which sets out what we are doing and how we work with members, customers and partners (Table 18).

¹⁵ https://www.newwestend.com/renew/pdf/NWEC_BID_Business_Plan_2021_2026.pdf

Table 18 : New West End Company 5 year delivery plan (Source New West End Company)

Three Pillar Delivery Plan	New West End Company	Members	Customers	Partners & Government
Customer Experience				
Clean, safe & healthy streets	Cleaning, Security, Enforcement, Resilience & Outreach services, Member Code of Conduct	Use NWEK services and adopt Code Invest in higher impact services Participate wellbeing programme Encourage Walk & Cycle for staff	Use NWEK services Provide feedback via surveys (x2pa) Use health & Wellbeing services from members to stay longer	Invest in greater policing, enforcement / maintenance Healthy Street recommendations funded & adopted Residents engage & advocate
Physical & Digital	Platforms & Services for members & customers, Christmas Lights, Celebratory 'moments'	Participate in campaigns, services & innovate the customer 'offer'	Join Loyalty Scheme Visit & Stay longer	Greater flexibility to innovate & activate in 'International Centre'
Campaigning				
Oxford St & Regent St District Transformation	Campaign for core completion by 2025 with Regent St improvements	Invest £80m scheme through planning gain & co-funding	Increase visitors London & UK	Deliver £230m full district wide scheme by 2025
Elizabeth Line readiness	Campaign full opening & district improvements outside stations 2022	Prepare opening, invest & resilience	Increase visitors from Greater London	Open full scheme by 2023 Invest Accessible transport & Space
Economic	'International Centre' Advocacy Campaigns - EU Tax Free, Sunday Trading, Rates, Police Resources	Support Advocacy Campaigns	Increase visitors & spend from London, UK and Globally	Adopt policies for Covid recovery & sustainable district growth
Inward Investment	Promotional & District Campaigns Income generation	Partner NWEK Campaigns Invest in West End business/ building	Advocate West End as 'innovative' and 'transformative' global district	Promote District: GREAT, Visit Britain, London & Partners
Social & Environmental	Advocate Sustainable Programmes Convene members & partners NWEK Responsible Procurement	Commit to Renewable Energy Use consolidation Scheme Join Food Waste Scheme Reduce plastic to customers	Participate; food waste, recycle & re-use, reduce plastic, car-free days & carbon offset campaigns	Zero Emission Traffic Zone by 2025 Policies & investment to reach net zero carbon city by 2040
Insights & Innovations				
Sustainable District Showcase & Reporting	Base Data Sets (2021/22) Audit & Best Practice annually with Progressive Targets	Set out Zero Carbon, Waste & Air, Resilience - Progressive Targets pa	Recognition through annual survey of members progress & commitments	Cite NWEK audit & members' best practice in addressing climate change
Data Driven Performance	PwC Insights & Measurements to support members, investment and policy campaigning	Sign Up & Use Evolve programme & feedback value	Participate Customer Surveys (x2pa)	Economic prosperity improved through Govt action and relevant trade bodies using our insights

How effective has your recovery strategy been? How do you know/measure this?

Given the immense impact of the pandemic on the area we are not expecting turnover to return to £10bn until 2025. However, this is the fundamental objective of our recovery strategy; it's specific, measurable, achievable, relevant and timebound. In addition, we can easily monitor our progress through the data we collect.

Whilst we want to return to pre-pandemic levels of spend, we have also committed to do this in a more sustainable way – by becoming the first Zero Emissions Transport Zone in London, by ambitious projects to cut waste and recycle, by greatly improving the public realm for local communities as well as visitors.

In the short term, whilst we support the recovery, one way to judge its likely effectiveness is to look at investor confidence in the area. There is £5bn of development funding coming in the next three to five years.

We believe it is far too early to anticipate any radical changes caused by COVID-19. Locations as important as the New West End do not lose their position in the place hierarchy overnight. The confidence of investors and our levy payers suggests to us that we are in a strong position to manage any evolution – including the pressing requirement to address climate change - and the use of data ensures we have the intelligence we need to do this.

Appendix A: Classification of Annual Signatures for English Towns

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Altrincham	Multifunctional	Multifunctional	Reduced
Ashford	Multifunctional	Multifunctional	Reduced
Barnsley	Comparison	Multifunctional	Reduced
Barnstaple	Comparison	Speciality	Reduced
Basingstoke	Multifunctional	Multifunctional	Reduced
Bath	-	Comparison	Reduced
Bedford	Multifunctional	Multifunctional	Reduced
Beeston	Multifunctional	Multifunctional	Reduced
Bexleyheath	Multifunctional	Multifunctional	Recovered
Blackburn	-	Multifunctional	Reduced
Blackpool	Holiday	Holiday	Summer Boost
Bognor Regis	Speciality	Speciality	Recovered
Bournemouth	Holiday	Speciality	Recovered
Bradford	-	Multifunctional	Reduced
Braintree	-	Multifunctional	Reduced
Brentford	Multifunctional	Speciality	Recovered
Brierley Hill	-	Multifunctional	Recovered
Brighouse	-	Multifunctional	Recovered
Brighton	-	Speciality	Reduced
Bristol	Comparison	Comparison	Reduced
Brixton	Speciality	Speciality	Recovered
Bromley	Comparison	Comparison	Reduced
Burnham on Sea	-	Holiday	Recovered
Bury St Edmunds	Speciality	Speciality	Recovered
Cambridge	Multifunctional	Multifunctional	Reduced

Classification of Annual Signatures for English Towns (cont.)

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Camden	Multifunctional	Speciality	Reduced
Canterbury	-	Multifunctional	Reduced
Chelmsford	-	Multifunctional	Reduced
Cheltenham	-	Comparison	Reduced
Chester	Comparison	Speciality	Reduced
Chichester	Speciality	Speciality	Reduced
Clacton On Sea	Speciality	Speciality	Reduced
Cleethorpes	Holiday	Holiday	Recovered
Congleton	-	Speciality	Recovered
Cosham	Multifunctional	Multifunctional	Recovered
Covent Garden	Speciality	Speciality	Much Reduced
Croydon	Multifunctional	Speciality	Reduced
Darlington	-	Multifunctional	Reduced
Dartford	Speciality	Holiday	Recovered
Dartmouth	Holiday	Holiday	Summer Boost
Derby	Multifunctional	Speciality	Reduced
Doncaster	-	Multifunctional	Reduced
Dover	-	Speciality	Recovered
Dudley	-	Multifunctional	Recovered
Durham	Multifunctional	Multifunctional	Much Reduced
Ealing	Multifunctional	Speciality	Recovered
Eastleigh	Multifunctional	Speciality	Recovered
Eltham	Multifunctional	Multifunctional	Reduced
Exeter	Comparison	Multifunctional	Reduced
Fitzrovia	Multifunctional	Multifunctional	Much Reduced
Gloucester	Comparison	Comparison	Reduced

Classification of Annual Signatures for English Towns (cont.)

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Gravesend	Multifunctional	Multifunctional	Recovered
Great Yarmouth	Speciality	Speciality	Recovered
Greater Yarmouth	Holiday	Holiday	Summer Boost
Greenwich	Speciality	Speciality	Recovered
Grimsby	Speciality	Speciality	Recovered
Guildford	Multifunctional	Multifunctional	Reduced
Guisborough	Multifunctional	Multifunctional	Reduced
Halesowen	-	Multifunctional	Recovered
Halifax	-	Multifunctional	Reduced
Hammersmith	Multifunctional	Multifunctional	Reduced
Harlesden	-	Speciality	Recovered
Harrow	Multifunctional	Multifunctional	Recovered
Hastings	Holiday	Holiday	Recovered
Havering - Colliers Row	-	Multifunctional	Recovered
Havering - Elm Park	-	Multifunctional	Recovered
Havering - Harold Hill	-	Multifunctional	Recovered
Havering - Hornchurch	-	Multifunctional	Reduced
Havering - Rainham	-	Speciality	Recovered
Havering - Romford	-	Speciality	Recovered
Havering - Upminster	-	Multifunctional	Recovered
Heart of London	Speciality	Speciality	Much Reduced
Holmfirth	-	Multifunctional	Recovered
Horsham	-	Multifunctional	Reduced
Hounslow	Multifunctional	Multifunctional	Recovered
Huddersfield	-	Multifunctional	Reduced
Hull	Comparison	Comparison	Reduced
Huyton Village	-	Multifunctional	Recovered

Classification of Annual Signatures for English Towns (cont.)

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Ilford	Speciality	Speciality	Reduced
Ipswich	Comparison	Comparison	Reduced
Kendal	-	Multifunctional	Reduced
Kenilworth	Speciality	Speciality	Recovered
Kensington	Speciality	Speciality	Much Reduced
Kingston	-	-	Recovered
Lancaster	Multifunctional	Multifunctional	Reduced
Leamington Spa	Comparison	Multifunctional	Reduced
Leeds	Multifunctional	Multifunctional	Reduced
Leicester	-	-	Reduced
Leicester Square	Speciality	Speciality	Much Reduced
Lichfield	-	Speciality	Recovered
Liverpool	Comparison	Multifunctional	Reduced
London New West End	Multifunctional	Multifunctional	Much Reduced
Loughborough	Multifunctional	Multifunctional	Reduced
Luton	Multifunctional	Speciality	Recovered
Macclesfield	-	Multifunctional	Reduced
Maidenhead	Comparison	Speciality	Reduced
Maidstone	Comparison	Multifunctional	Reduced
Manchester	Comparison	Comparison	Reduced
Manchester - Cheetham Hill	-	Speciality	Recovered
Manchester - Rusholme	-	Speciality	Recovered
Manchester - Chorlton	-	Multifunctional	Recovered
Manchester - Fallowfield	-	Multifunctional	Recovered
Manchester - Gorton	-	Multifunctional	Recovered
Manchester - Harpurhey	-	Speciality	Recovered

Classification of Annual Signatures for English Towns (cont.)

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Manchester - Levenshulme	-	Speciality	Recovered
Manchester - Northenden	-	Multifunctional	Recovered
Manchester - Victoria Avenue	-	Multifunctional	Recovered
Manchester - Withington	-	Multifunctional	Recovered
Mansfield	Multifunctional	Speciality	Recovered
Market Harborough	Multifunctional	Multifunctional	Recovered
Melton Mowbray	Multifunctional	Multifunctional	Reduced
Middlesbrough	-	-	Reduced
Morley	-	Multifunctional	Recovered
Newbury	Multifunctional	Multifunctional	Reduced
Newcastle	Multifunctional	Multifunctional	Reduced
Newquay	Holiday	Holiday	Summer Boost
Northampton	Multifunctional	Multifunctional	Reduced
Northbank	Multifunctional	Multifunctional	Much Reduced
Norwich	Speciality	Multifunctional	Reduced
Nottingham	Multifunctional	Multifunctional	Reduced
Oldham	Speciality	Speciality	Recovered
Ormskirk	-	Speciality	Recovered
Oxford	Multifunctional	Multifunctional	Reduced
Plymouth	Comparison	Multifunctional	Reduced
Poole	Holiday	Holiday	Recovered
Portsmouth	Comparison	Comparison	Reduced
Prescot	-	Multifunctional	Recovered
Preston	-	Multifunctional	Reduced
Reading	Multifunctional	Multifunctional	Reduced
Redcar	Speciality	Speciality	Reduced

Classification of Annual Signatures for English Towns (cont.)

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Richmond	-	Multifunctional	Reduced
Rochdale	-	Multifunctional	Reduced
Rotherham	Speciality	Multifunctional	Recovered
Rugby	Speciality	Speciality	Reduced
Salisbury	Comparison	Speciality	Reduced
Saltburn	Speciality	Speciality	Recovered
Scarborough	Speciality	Speciality	Recovered
Scunthorpe	Comparison	Speciality	Recovered
Sedgley	-	Multifunctional	Recovered
Sheffield	Multifunctional	Multifunctional	Much Reduced
Shepherds Bush	Multifunctional	Multifunctional	Reduced
Shrewsbury	Multifunctional	Comparison	Reduced
Skipton	-	Speciality	Reduced
Sleaford	Multifunctional	Multifunctional	Reduced
Sloane Street	Multifunctional	Multifunctional	Reduced
Slough	-	Multifunctional	Recovered
Southfields	-	-	Recovered
Southport	Speciality	Speciality	Recovered
Southsea	Speciality	Speciality	Recovered
Spennymoor	Speciality	Speciality	Recovered
St James' Piccadilly	Multifunctional	Multifunctional	Much Reduced
Stafford	Multifunctional	Multifunctional	Reduced
Stockton-on-Tees	Multifunctional	Speciality	Recovered
Stoke-on-Trent	Multifunctional	Multifunctional	Reduced
Stratford Upon Avon	Holiday	Holiday	Recovered
Sunderland	Comparison	Multifunctional	Reduced

Classification of Annual Signatures for English Towns (cont.)

Retail Centre	Signature Type		
	2014 - 2016	2017 - 2019	2020
Sutton	Multifunctional	Multifunctional	Recovered
Swindon	Comparison	Multifunctional	Reduced
Taunton	Comparison	Comparison	Reduced
Truro	-	Comparison	Reduced
Wakefield	-	Speciality	-
Walsall	-	Speciality	Recovered
Walthamstow	Speciality	Speciality	Recovered
Warrington	-	-	Recovered
Warwick	Speciality	Speciality	Recovered
Waterloo Quarter	Speciality	Speciality	Reduced
Watford	Multifunctional	Multifunctional	Reduced
Wellingborough	Multifunctional	Multifunctional	Recovered
Wembley	-	Multifunctional	Recovered
Weston Super Mare	Holiday	Holiday	-
Weymouth	Holiday	Holiday	Summer Boost
Willesden Green	-	Multifunctional	Recovered
Wimbledon	Multifunctional	Multifunctional	-
Windsor	Comparison	Speciality	Recovered
Wolverhampton	Multifunctional	Multifunctional	Reduced
Wood Green	-	-	Recovered
Woolwich	Comparison	Multifunctional	Reduced
Worcester	-	Multifunctional	Reduced
Worthing	Comparison	Comparison	Reduced
York	Comparison	Comparison	Reduced

