REVIEW OF HIGH STREET FOOTFALL

JULY 2019 - JUNE 2020

HIGH STREETS TASK FORCE

highstreetstaskforce.org.uk

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, 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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Executive Summary

Footfall is a key indicator of a town centre's vitality and viability; it tells us much about the nature of high streets, how they are used, and how they are changing. Yet despite its importance, the majority of high streets do not monitor footfall. This is a serious barrier to understanding the situation facing England's towns as they attempt to recover from the impact of COVID-19 and achieve longer-term transformation.

This report examines research based on footfall data from 154 locations in England, provided by Springboard. It also looks at the immediate impact of COVID-19 and the prospects for high street recovery, using mobile phone location and other data in four case-study locations (Manchester, Ashford, Cleethorpes and Windsor).

Even before COVID-19 struck, footfall was declining

All major trading periods, with the exception of Black Friday, reported less high street footfall in 2019/20, than the previous year.

Since 2015 there has been a decline in high street footfall of 5%. This is based on the overall trend line that accounts for seasonal and other variations. This fall in footfall does not mean all high streets are failing, rather it signifies their function is changing.

The impact of COVID-19 on high streets and town centres has been profound

Footfall volumes fell by 89.86% during the height of lockdown (28th March 2020) and even before lockdown was announced, there was a noticeable decline in footfall earlier in the month.

The bigger cities have suffered the most, devoid of their usual volumes of employees, tourists, students and shoppers. Major cities saw footfall drop by 75.9% on average in the period 1st March to 30th June.

There is some evidence that footfall patterns, during the week and during the day, have changed as a result of COVID-19. From the start of lockdown (March 23) to the end of June 2020, saturday was no longer the busiest day of the week. For the many people working from home, a trip to the local high street or town centre may now be possible during the week.

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"District and neighbourhood centres have been rediscovered through COVID-19."

"Essential retail and greenspace have been the nation's lifelines during lockdown."

District and neighbourhood centres have fared much better than big cities

As many people have stopped visiting larger cities, high streets that have served their local catchment with necessities have fared better than those that haven't.

From 1st March to 30th June, district centres saw footfall drop by only 34.5%. This compares to a drop of 75.9% in cities over the same period.

These district or neighbourhood centres have been rediscovered through COVID-19. Essential retail and greenspace have been the nation's lifelines during lockdown and these humble high streets would benefit from more recognition and support through national, regional and local policy.

After COVID-19, we must ask whether city centre residents are adequately provided with everyday services. Everyone in urban environments should be able to live within walking distance of food, green space, healthcare, schools and childcare etc. With reports that some employers are questioning the need for office space, combined with the increasing trend towards online shopping, there could well be land and property that can be repurposed to make cities more liveable for their resident population.

Footfall levels may not recover to pre-COVID levels

Our research suggests that overall footfall figures* are on trend to reach pre-COVID19 levels in November 2020. However this forecast is considered optimistic due to a number of factors:

Social distancing and other preventative measures place a capacity limit on businesses, public transport and high streets themselves. Whilst these measures are in place, it may not be possible for high streets to have the 'carrying capacity' suggested by the trendline.

The trend to a November 2020 recovery may also be misleading due to 'pent-up' demand that may have brought more visitors to the high street immediately after lockdown measures were eased. Future behaviour change – for example, switching to on-line shopping or working from home – and any local 'lockdowns' will also affect the speed of recovery and could also set a 'new normal' for footfall volumes.

The High Streets Task Force will only use November 2020 as a 'baseline' recovery date to assess the impact of future changes to restrictions, as they are announced by Government and the longer-term impact of behaviour change.

Retail is declining as a dominant occupier in town centres

This year, there is an increase in towns that are classified as 'multifunctional' (+8% in our sample) and these towns have suffered lower drops in footfall than 'comparison retail' towns.

44% of towns are multifunctional, having a footfall pattern that suggests they are no longer retail-dominant and are providing a number of other functions for their community.

Just 19% of towns are 'comparison retail' towns. This has fallen from 21% in 2018.

Based on the analysis in this report we expect smaller, multifunctional towns and districts that serve their local catchment effectively to be the town type that will recover fastest from the impact of COVID-19. Holiday towns may well also find they see stronger recovery during the summer months.

Whilst this report has provided an overview of footfall on England's high streets, every high street is different, and every place leader needs to understand the unique position, or the 'new normal', of the high street they are trying to improve.

Image courtesy of Planit-IE, © Adrian Lambert

Over a quarter of towns may be setting visions and plans that are unachievable

Many local planning authorities designate their centres using a retail hierarchy: major city, regional centre, sub-regional centre, major town, town, and district. Research shows that often there are no real differences when it comes to footfall volumes across neighbouring classifications (for example, between major towns and towns) (Mumford et al. 2020).

In our research sample, 10% of towns are busier than their planning designation would suggest; and 26% of towns are quieter than their planning designation would suggest.

Quieter towns may be prone to pursue retail or commercial development in line with their 'status' in the retail hierarchy. We believe that serving their local population by being a multifunctional hub is a more achievable route to success.

A reduced hierarchy based on footfall volumes might be more useful for planners and decision makers, especially as retail is losing its dominance as an anchor for visitation. An 'activity hierarchy' is proposed, of major city, regional centre, town, and district. This will make planning designations simpler and more congruent with a location's current usage levels and functions.

Footfall data provides valuable insight for place leaders

For local authorities and place leaders that want to make evidenced-based decisions and that may, for capacity or funding reasons, need to choose only one dataset – then this should be footfall.

To support high streets that do not have automated footfall counting, the High Streets Task Force has a manual counting regime, that can provide basic data to help places monitor their recovery process and also understand how and if their function and attractiveness may be changing, as a result of COVID-19.

The Task Force will also provide training and various data to place managers and leaders to augment footfall data and support the type of local analysis and decision-making that leads to better outcomes.

Table of contents

1. Introduction

The High Streets Task Force was commissioned by the Ministry of Housing, Communities and Local Government in 2019 to help local place leaders reinvent their high streets. Acknowledging that the many different people and organisations who care about their neighbourhood, town and city centres needed a national programme of data, training and expert advice was a major step forward. Now, as a result of COVID-19, our high streets face the biggest threat ever, at least in our lifetime. So, the role of the High Streets Task Force to support place leaders from local authorities, businesses and the wider community, to work together to respond to this challenge, becomes even more critical.

Previous projects and research undertaken by the Institute of Place Management, the lead partner in the High Streets Task Force, have demonstrated that data and evidence underpin all good decision making, when it comes to making better places. Of course, there is no shortage of data on the performance of the high street, but the purpose of this report is to provide a state-of-the-art review of, what we believe, to be the high streets most important indicator: *footfall*.

We choose footfall as it has a number of benefits. First, it is very *responsive*. Footfall can be used to measure the changes on your high street, almost in 'real-time'. Second it is a good *proxy*. There is a relationship between footfall and other important indicators such as spend, property/rental values, and occupancy rates. Third, it is *easily understood* and can be shared across different stakeholders without misinterpretation. Finally, it is relatively *cheap and easy* to acquire. In fact, the High Street Task Force has developed a manual counting programme that many towns are undertaking, some relying on time from volunteers to undertake the counts.

Our review is predominantly intended to be a reference document, for place leaders, Government, and for the High Streets Task Force. **We explain how the report might be used by place leaders in Section 1.1.** The rest of section 1 explains our methodology.

Section 2 looks at overall footfall trends in England, on an annual, monthly and day-by-day basis and by time of day.

Section 3 investigates seasonal trends and key trading periods of August, Easter, Christmas and the growing impact of Black Friday.

Section 4 identifies patterns in footfall to classify town centres, examining what annual, weekly and daily 'signatures' tell us about places, as well as annual footfall volumes.

Section 5 uncovers unexpected events that can impact upon footfall; this year obviously focusing upon the effect of COVID-19.

Section 6 looks in more detail at COVID-19 and its influence on footfall in England.

Section 7 explores four case-study towns (Manchester, Ashford, Cleethorpes, and Windsor), to understand the impact of COVID-19 at more local level.

Finally, **Section 8** contains our conclusions.

1.1 How to use this report

This is the first of four annual reports on footfall in England's high streets that form part of the information and data provision from the High Streets Task Force. The Task Force is funded by government until June 2024 and offers support to local authorities and other placemakers and leaders as they seek to transform and redefine their high streets. 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 explore 'unexpected events'.

1.1.1 Local Authorities

Councils with planning authority can use the report to compare trends in footfall against the national trends identified in the report (Section 2). It is important to identify those that may be experiencing a steeper decline, as different types of interventions may be needed or, if the decline appears 'immune' to a variety of responses, then the attractiveness of that location may have fundamentally altered. Again, comparing footfall volumes to the levels in the activity hierarchy presented in Section 4 can assist local planning authorities with designations (district, town, regional centre, city).

We would also recommend that local authorities use footfall data to identify the town types of all the settlements they are responsible for (comparison, speciality, holiday and multifunctional) as strategies to maintain/increase or, in some cases, decrease footfall need to be congruent with the underlying function of the town. Understanding the daily and weekly profile can also help ensure initiatives to encourage more people to use or invest in the town are successful.

1.1.2 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 2). These organisations are well placed to bring together local stakeholders to explore the town types (Section 4) and work up plans and strategies that are congruent with these functions.

1.1.3 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.

1.2 Method

The High Streets Task Force is a consortium of placemaking experts, several of whom have contributed to this report. The footfall data comes from Springboard, with additional data provided by Huq Industries, Ordnance Survey, Google and the Consumer Data Research Centre.

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

1.2.1 Analysing historical footfall

For sections 1-6 footfall data has been used from a sample of 154 city, town and district or neighbourhood centres across England. The footfall data is obtained from automated counting technology, provided by Springboard. The 154 locations cover cities, towns and districts/neighbourhoods and a limitation of this study is that we only have footfall data for a fraction of the high streets in England.

When comparing footfall from different time periods, it is important we have the same number of towns and counters in the whole data set, therefore there are slight differences in the number of towns in the data set used to compute the 5-year trend (Figure 2) from the rest of the analysis. The smaller number of towns in our 5-year dataset explains why the overall footfall volumes are lower in Figure 2 than they are in Figure 2.1a.

1.2.2 Forecasting footfall

In Section 5, 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. Additionally, we tried using different "start years" for our time series, the longest being 2007 to 2019, and the shortest 2015 – 2019. Springboard counters have been installed in more locations, as the years have gone by. Thus, a time series with a more recent start year will contain more locations than one with an earlier start year. The best performance (2.86% error) was observed from the NNETAR technique using 2011 as our start year, as is illustrated in Figure 1.2.2.

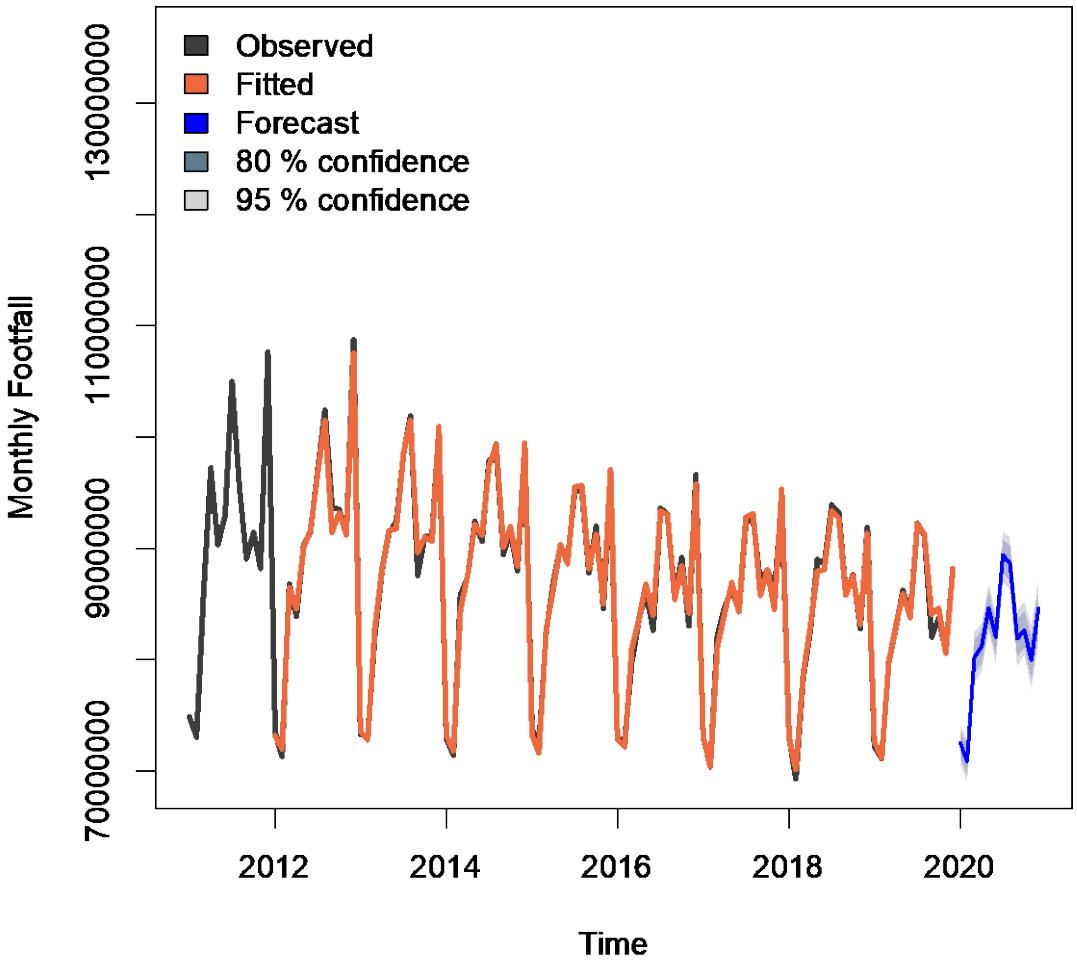


Figure 1.2.2 Pre-COVID-19 timeseries footfall forecast for England

In Section 6.3 we attempt a more basic forecast to estimate when footfall may return to 2019 pre-COVID levels. To do this, we calculate a linear trend line from actual footfall data for England (from 15th June to 30th June) and 2019 data for England (1st July to 17th August) that is adjusted by the UK daily year-on-year change percentage published by Springboard[1] (to bring it in line with 2020 levels). We also calculate a linear trend line for 2019 England footfall data, suggesting that footfall will return to 2019 levels where these trend lines intercept.

[1] https://www.spring-board.info/benchmark/daily-footfall

1.2.3 Case-studies

In Section 7 we have brought together several datasets (Table 1.2.3) in order to understand the impact of COVID-19 upon four case-study towns/cities.

Using mobile location data has enabled us to consider footfall across the case-study high street areas, while also analysing how far people are travelling to the high street and the duration of each visit. This has been complemented by the camera data which shows actual footfall volumes at specific high street locations. Land-use information is also used to identify the types of high street areas where footfall is recovering more or less quickly, while social media data was used to highlight how businesses are engaging with their customer base throughout lockdown.

The case studies have been undertaken by PwC

Data Source	Description
huq	Mobile location data measures high street activity within a defined polygon.
SPRINGBOARD.	Camera data measures high street footfall at specific locations where cameras are present.
Ordnance Survey	Ordnance Survey data provides more granular high street polygons and information about land use in each of them.
Google	Google's COVID-19 Community Mobility Reports measures footfall to retail and recreation locations globally and regionally.
Maybe*	Social media data measures sentiment and shows trending words in posts from local businesses.

Table 1.2.3 Data sources used in the four case-studies

There were two steps to the generation of the case-study analyses, First, data had to be gathered. Polygons for each location (Figure 1.2.3a) were defined based on Consumer Data Research Centre (CDRC) retail centre definitions.

For each of these polygons, data was gathered from the four sources described in Table 1.1.3. Mobile location data was sampled from devices within each of these polygons, while

the camera data analysed was also restricted to the polygon areas. When analysing social media posts from local businesses, only businesses located within each of these polygons were considered.

Figure 1.2.3a Polygons representing the four high street areas considered for the case studies

The next step was to establish a baseline. The number of users in the mobile location data analysed has increased significantly over time, making year-on-year comparisons difficult (Figure 1.2.3b). Therefore, a five-week period from the 6th January 2020 to the 9th February 2020 has been chosen as a baseline period when analysing changes in behaviour through lockdown.

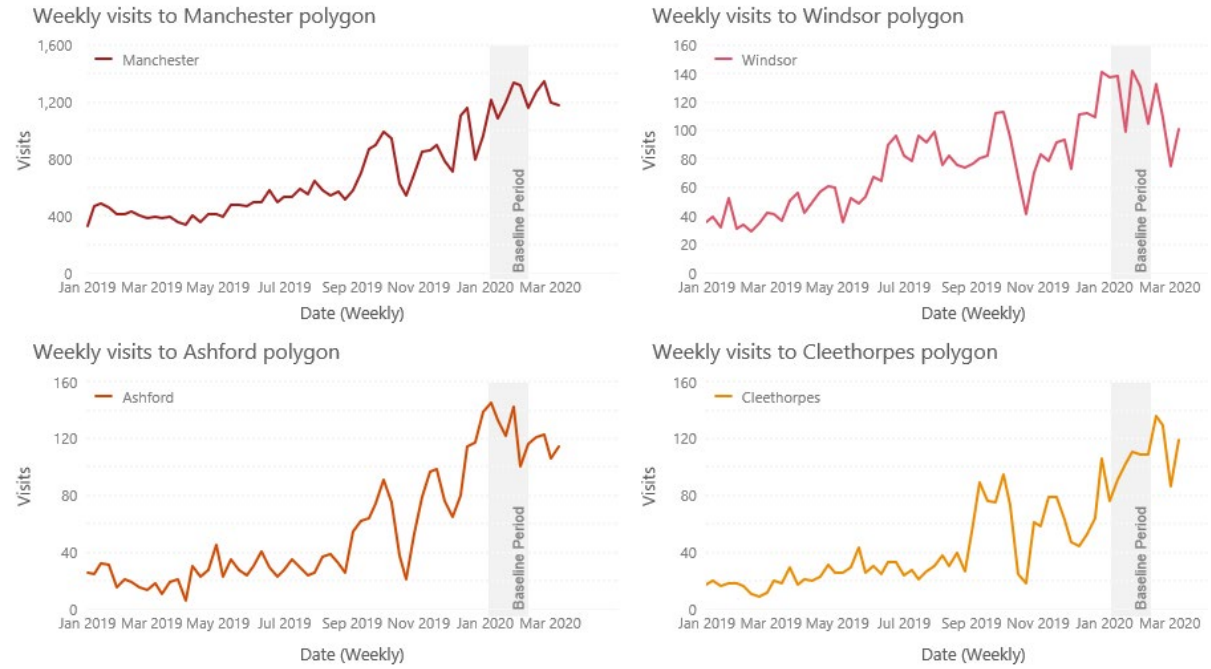


Figure 1.2.3b Mobile location user numbers in each town polygon from Jan 2019 - March 2020

This five-week baseline, shaded in grey in Figure 1.2.3b, is consistent with the Google COVID-19 Community Mobility Report baseline, allowing for a direct comparison with this additional dataset. As with the Google data, we have selected a baseline for each town based on the median activity level across each week in the baseline period. The five-week baseline selected for the case-studies does allow us to reflect on how well the locations are recovering, in relation to their pre-COVID-19 situation in January. However, as we are not comparing similar time periods, we cannot say how the towns are recovering, in relation to their expected performance for a particular time of year. Therefore, we also compare monthly footfall figures for the period Jan-July 2019 to Jan-July 2020 in each of the case-study towns.

2. Overall footfall trends in England

High Street footfall across the country has fallen each year for the last decade. There are towns that are exceptions to this, but the general trend is one of decline. Figure 2 shows how footfall has changed over the past five years; the trend line (rolling average: red) is going down and equates to a decline of 5% over the last 5 years.

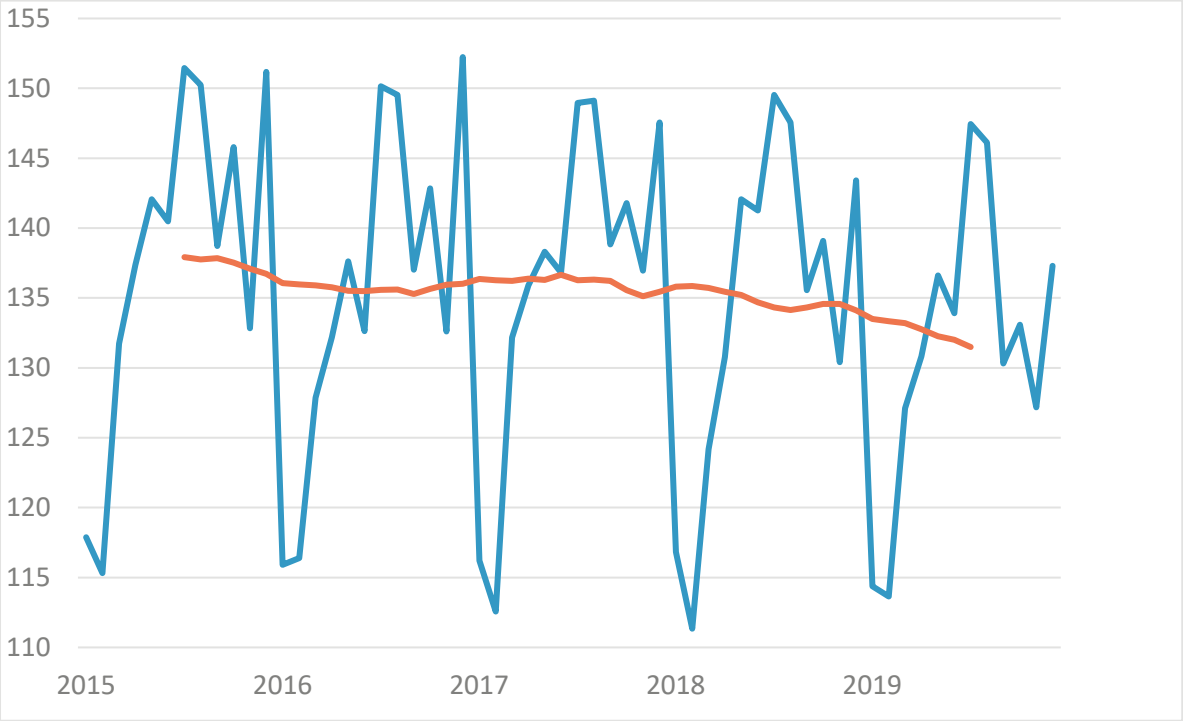


Figure 2: Overall footfall trend for 5-year period (2015 to 2019)

When looking at footfall for any period, it is necessary to compare with a similar period. This section, therefore, explores footfall from July 2018-June 2019 and from July 2019 to June 2020. It offers yearly, monthly, and daily comparisons. It also explores footfall across daytime, evening, and night-time economies.

2.1 Overall trend

Footfall for 2019/2020 follows the profile of 2018/2019 fairly closely until February 2020, after which we see a sharp decline is evident (Figure 2.1a) due to the emergence of the pandemic.

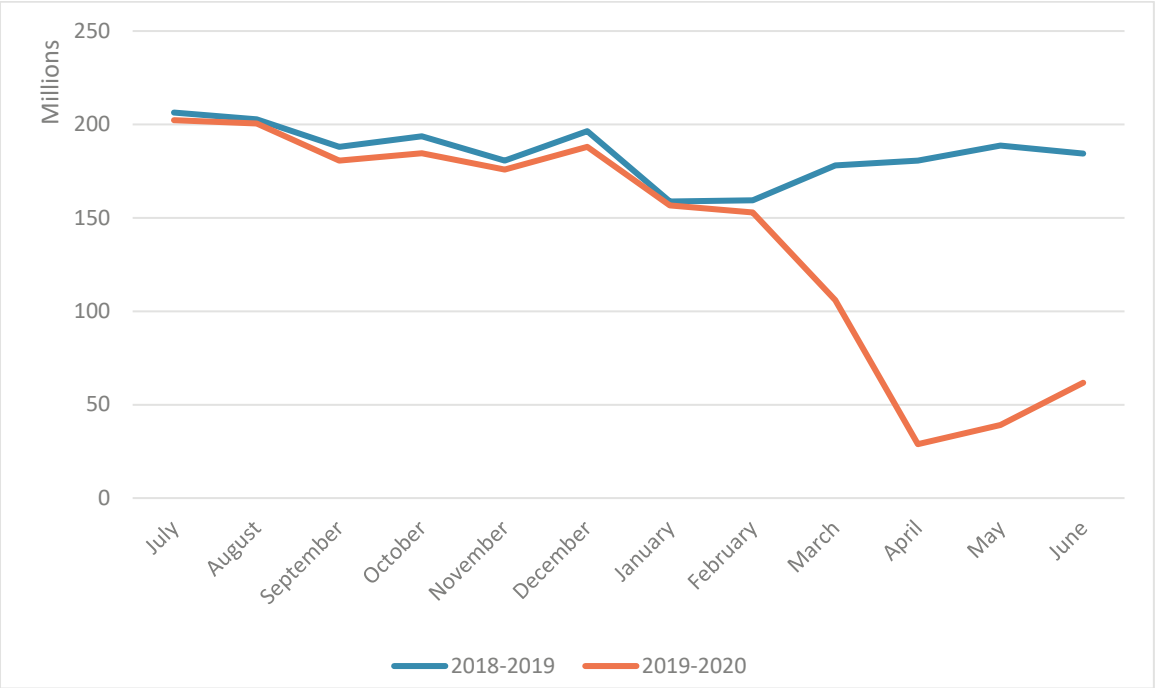


Figure 2.1a Monthly footfall comparison July 2019 - to June 2020

In March 2020 (Figure 2.1b), footfall patterns were extremely volatile in response to the news and updates regarding the spread of COVID-19 and the possibility of a lockdown, which resulted in stints of panic buying in the first half of March (and a couple of very busy days), followed by gradual decline that coincided with the uncertainty as to whether a lockdown was going to be applied or not.

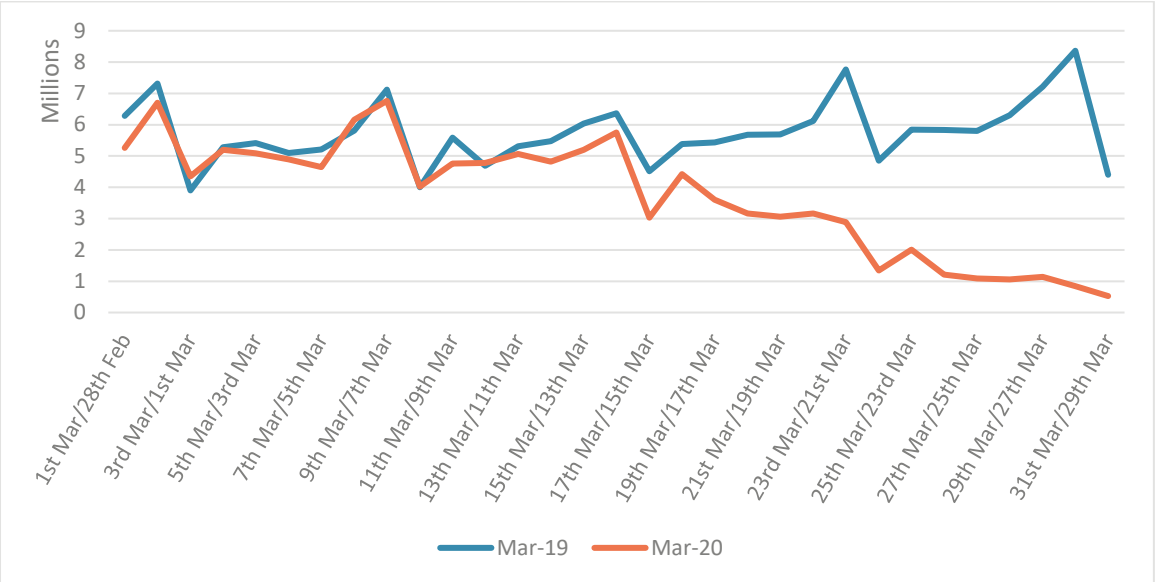


Figure 2.1b. Daily footfall comparison March 2019 and March 2020

March 2020 footfall figures show that many people had already made the decision to avoid visiting their town centres and high streets before lockdown measures were imposed, and we expect they will continue to make their own judgements on the level of risk and appropriate mitigation strategies. So, footfall recovery will not be only influenced by the government's strategy of getting the economy moving again, but also by the individual choices and perceptions of visitors.

2.2 Monthly comparison

The monthly comparison (Figure 2.2) shows how much footfall has decreased over the last 12 months compared to the same months in 2018-2019. Overall, we can evidence a slight drop in footfall ranging across all months prior to the COVID-19 pandemic, with the biggest drop evidenced in October, where footfall was down by 4.6% across our sample. As mentioned above, from mid-March 2020 onwards, there is a massive decline in footfall numbers that stems directly from the effects of COVID-19 and the subsequent lockdown measures. In April 2020, footfall numbers were down 84% compared to last year. There is, however, a steady rise from May as the weather got warmer, people could take more exercise and tolerance to lockdown started to weaken. It is anticipated that the upwards trend will continue now that social distancing measures have relaxed, a new face coverings policy is in place, and many more high street businesses are now operating. However, the return to the new "normal" will still be challenging for people, influenced by the spread, or containment, of the virus, as well as other factors such as the choices of anchor institutions in particular locations. For example, universities may move more of their teaching on-line, which could result in less students in some town and city centres. Likewise, firms may choose to keep employees working from home, and reduce their need for office accommodation.

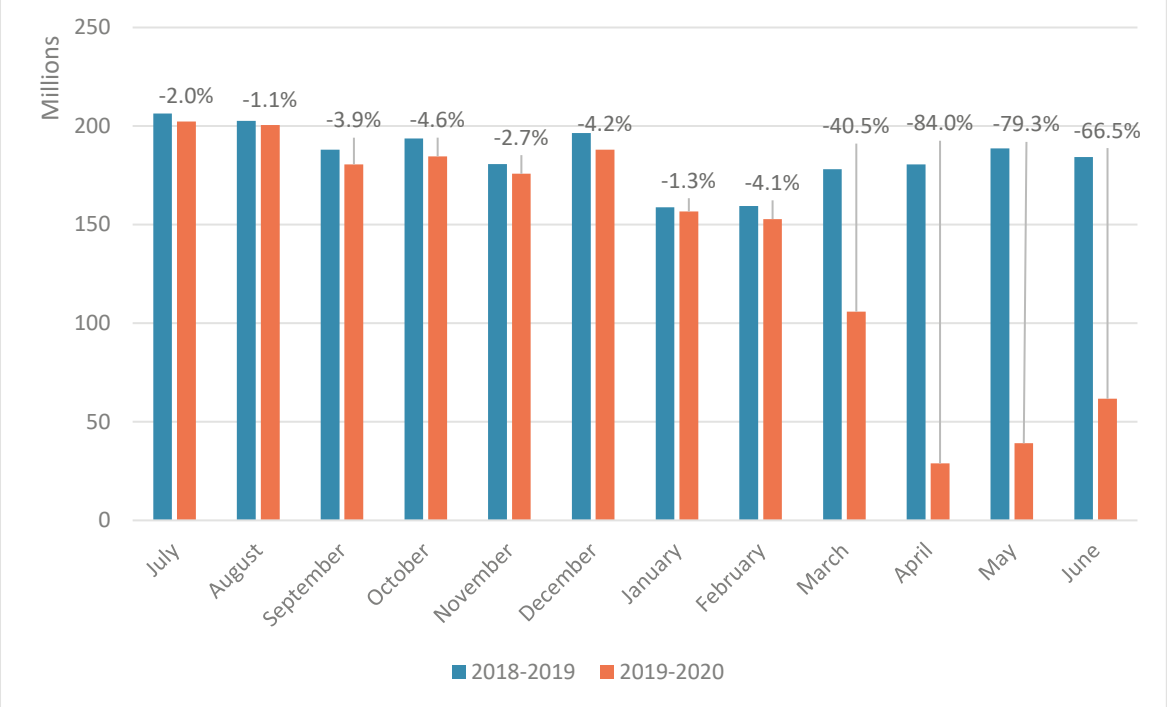


Figure 2.2. Month-to-month comparison 2019 vs 2020

2.3 Daily comparison

Figure 2.3 demonstrates the overall weekly pattern across English towns and cities for the periods 2018-2019 and 2019-2020. The graph shows a slight variation in how footfall is spread out over the week, with Mondays and Tuesdays gaining a bit of weekly footfall volume compared to the weekend. These slight variations are mainly an outcome of COVID-19, and we will look at these in more detail further in the report (Section 5).

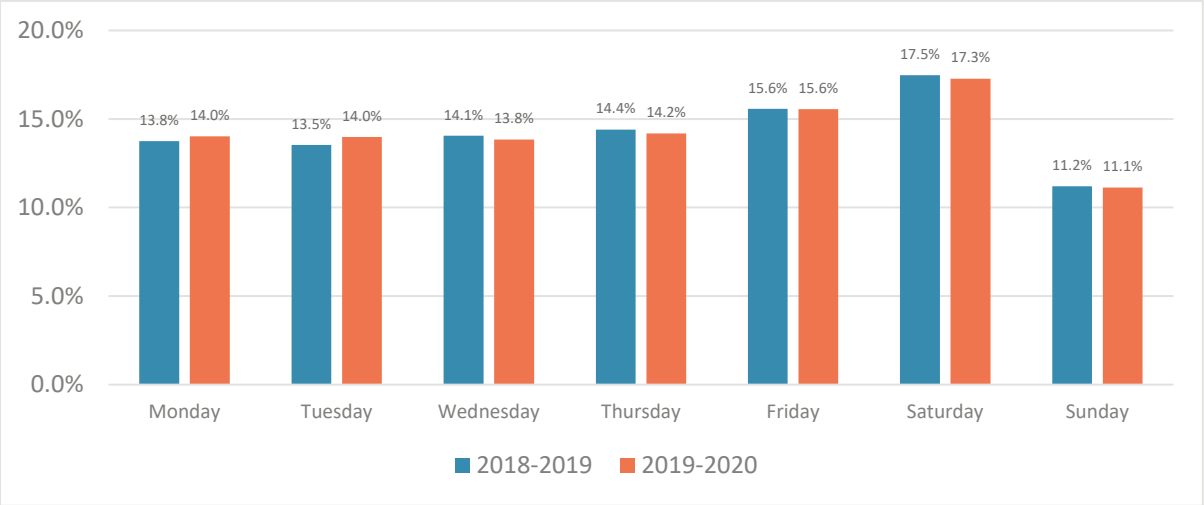


Figure 2.3. Daily Comparisons 2019 vs 2020

2.4 Daytime, evening and nighttime economies

Similarly, when we compare the spread of footfall across the hours of the day there is not much difference between the two periods (Figure 2.4a). That is because the volume of pre-COVID-19 data (8 months) is much greater than the period of COVID-19 data 4 months). In order to understand the effect of COVID-19 in more detail, we analyze this data separately, in Section 5.

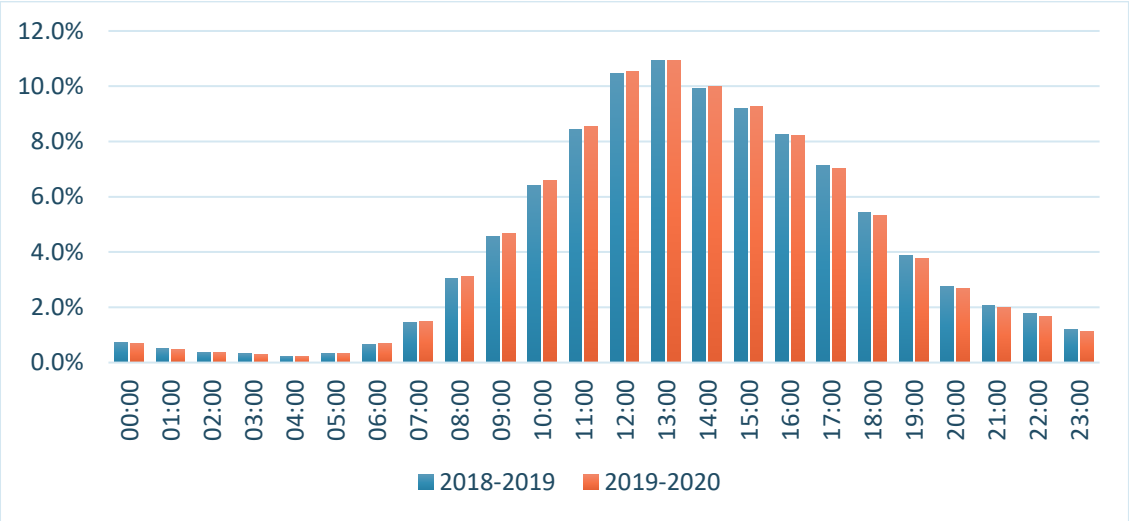


Figure 2.4a. Daytime, evening and nighttime economy: Hourly comparison 2019 vs 2020

On a similar theme, the split of footfall across the different economies is very similar, for the same reason mentioned above (Figure 2.4b). However, the daytime economy (9am-5pm) share has gone up 1% which bucks the trend of this gradually shrinking over recent years, as the evening and nighttime economy grow in importance.

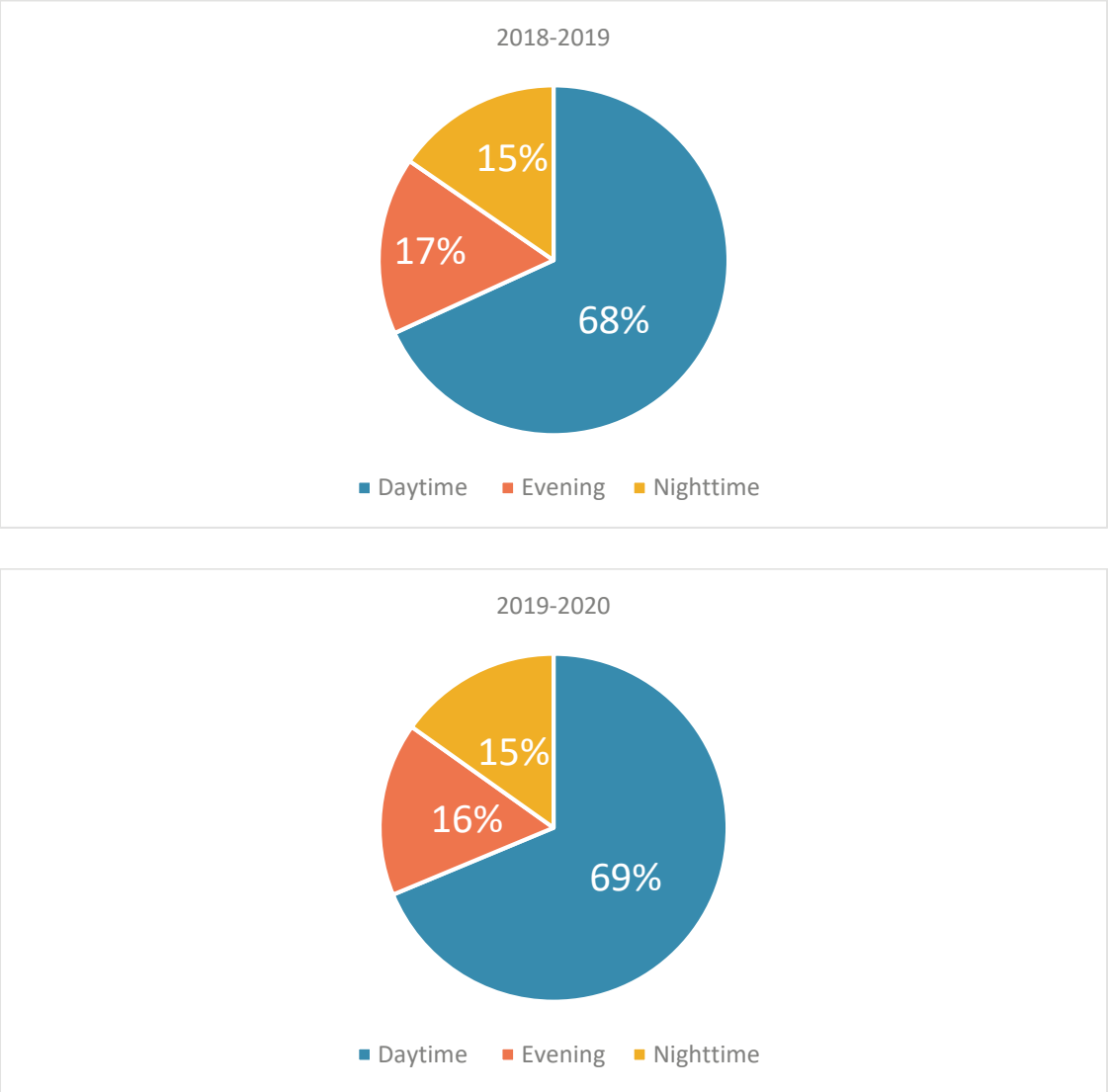


Figure 2.4b. Daytime, evening and nighttime economy: Share or footfall volumes 2019 vs 2020

3. Seasonal trends and key trading periods

This section looks at footfall volumes during key dates in 2018 and 2019. These are: summer holidays, Easter holidays, Christmas trading, Christmas period (from Boxing Day to New Year), and Black Friday.

3.1 Summer holidays

August is a key month for holiday towns or towns that rely on tourism. Overall, 2019 footfall was slightly lower than 2018 (down 1.1% on our sample), despite hot weather during the late August back holiday weekend in most regions (Figure 3.1).

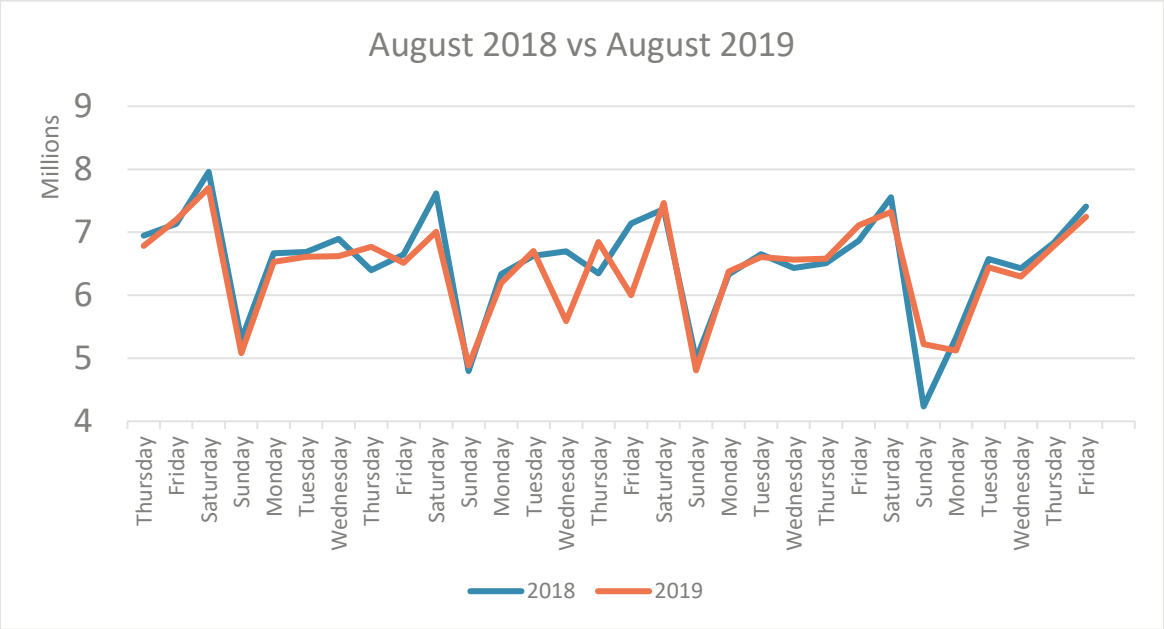


Figure 3.1 Summer day-on-day comparison: August 2018 vs August 2019

3.2 Easter

Easter is also a key trading period, especially in towns that have heritage and culture. Towns with strong food retailing and hospitality offer do well at this time of year. Figure 3.2 below shows how devastating COVID-19 has been during this key trading period, as footfall numbers were down by more than 85% in all four days.

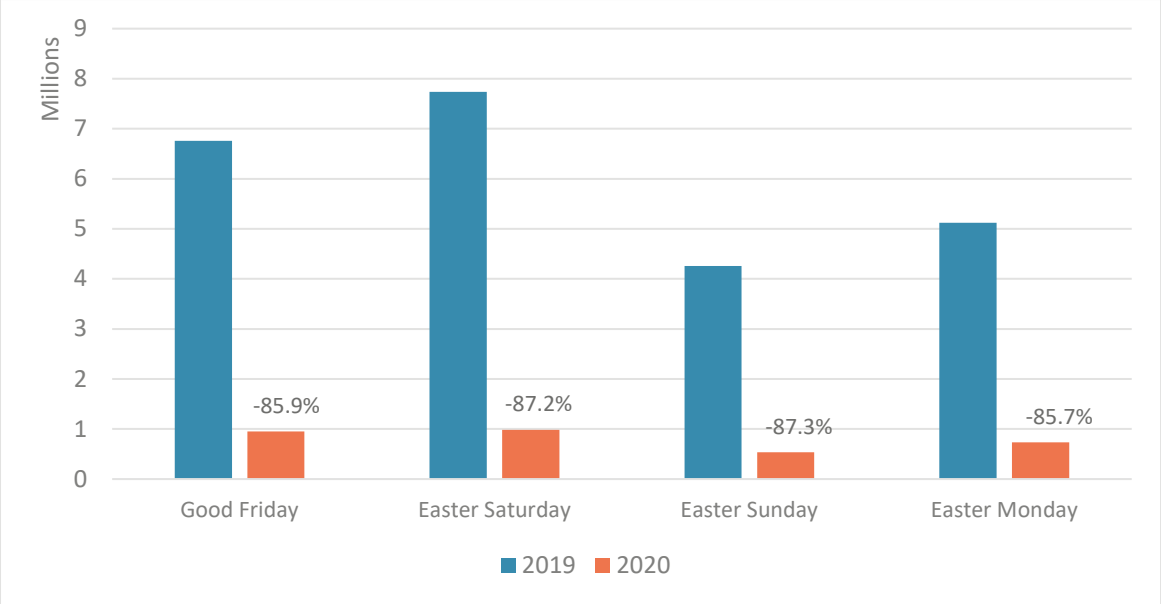


Figure 3.2 Easter Week: 2019 vs 2020

3.3 Christmas

Christmas has, traditionally, been the busiest time of year for the major retail centres, or comparison towns. The start of the Christmas period in 2019 was very similar to 2018 but reduced in the two weeks before Christmas. Part of the reason of the drop in the later part of the month may be due to a strong Black Friday 2019, as it coincided with the first week of Christmas shopping (see Figure 3.3c).

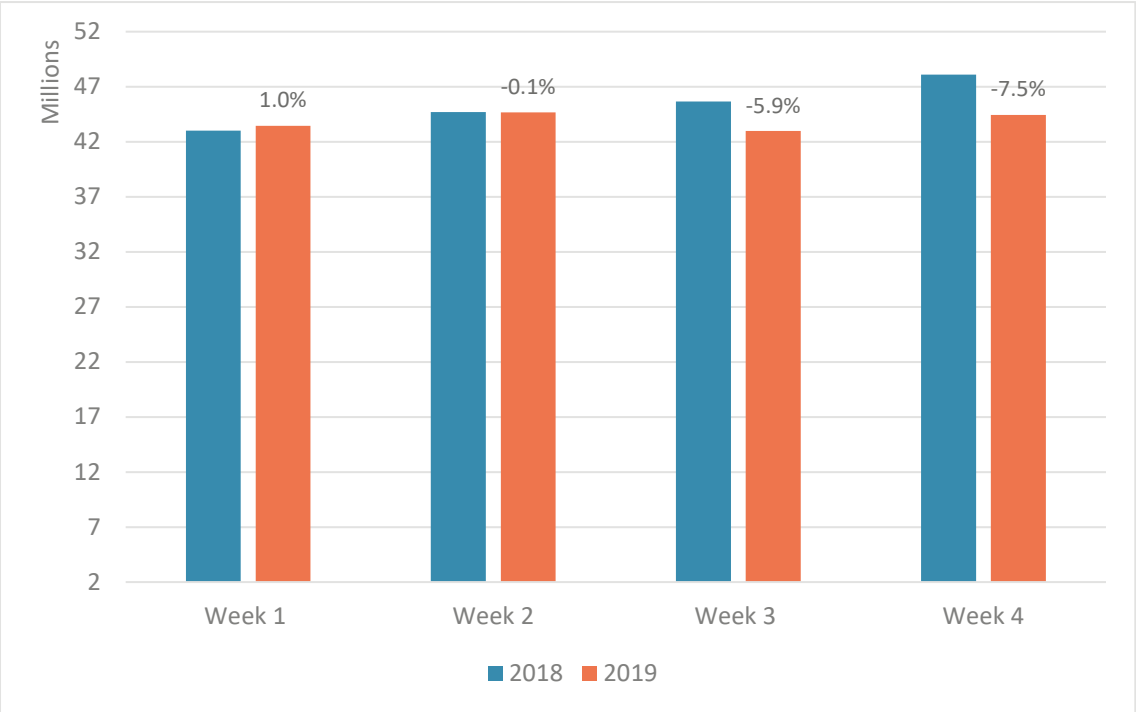


Figure 3.3a. Christmas Trading: 2018 vs 2019

In the figure below (Figure 3.3b) we see that Boxing Day footfall in 2019 is less than that in 2018 – following a trend of more people accessing the sales online, rather than 'camping out' on the high street. The big differences in 29th and 30th are just days of the week effects. We are comparing a Saturday with a Sunday on the 29th so the Saturday in 2018 is bound to busier than the Sunday in 2019. Likewise, the 30th compares a Sunday with a Monday, so the Monday will always be busier.

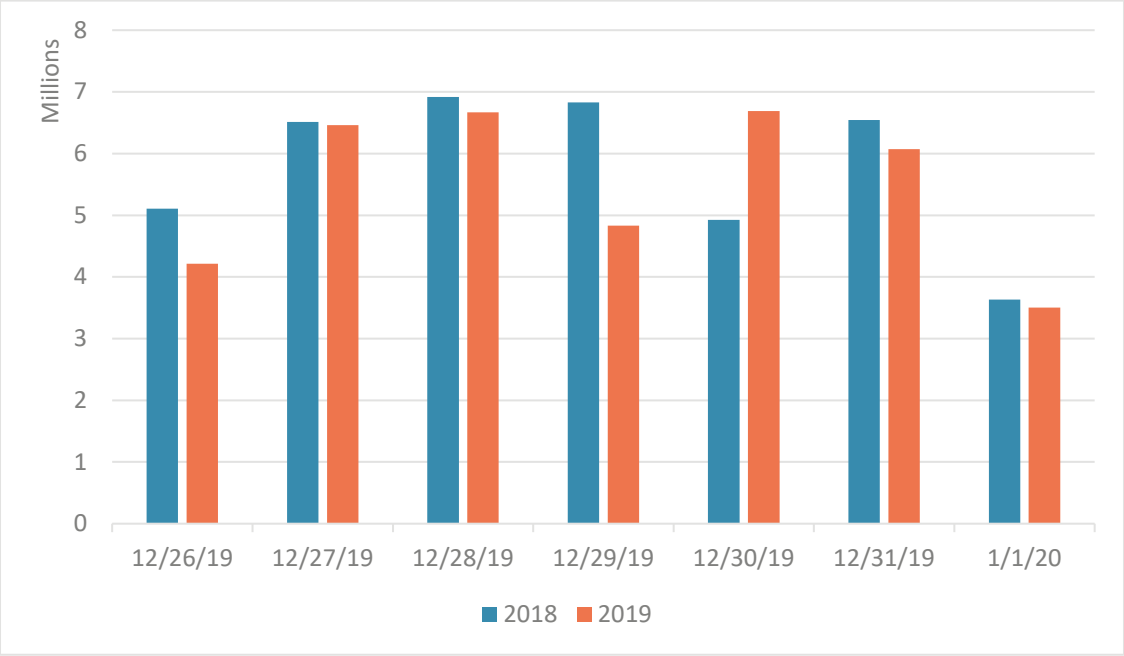


Figure 3.3b. Boxing Day to New Year's Day: 2018 vs 2019

Lastly, Black Friday 2019 happened on 29th November, and coincided with Christmas shopping and payday for most consumers. This resulted (Figure 3.3c) in an increase of 5.6% in footfall compared to Black Friday in 2018 (which was on 23rd November). However, the compounded impact of Black Friday and Cyber Monday on 2nd December could have resulted in significant drop in footfall over the last two Christmas trading weeks.

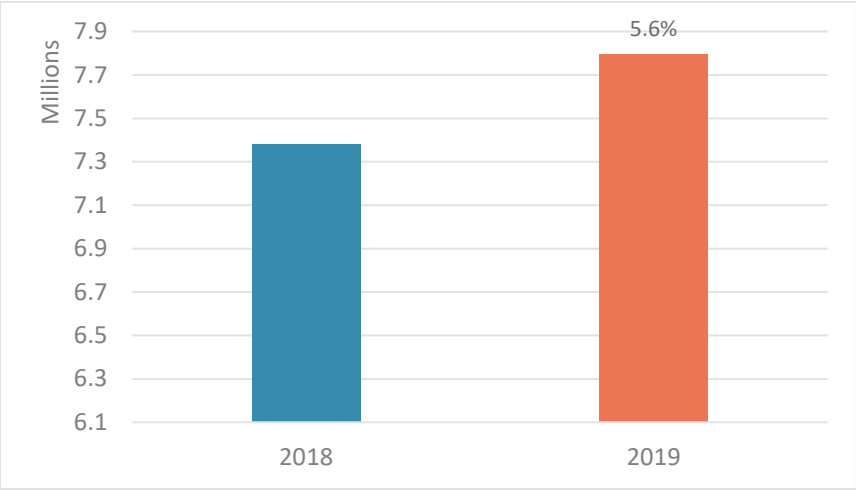


Figure 3.3c Black Friday: 2018 vs 2019

4. Classifying UK high streets by activity patterns and volumes

This section offers a brief overview of town types (based on annual, weekly, and daily footfall patterns) and the activity hierarchy (based on footfall volumes).

4.1 Annual signatures

Traditionally, it was assumed that most centres show an increase in footfall in December during the pre-Christmas period, and that this is the busiest time of year. Research conducted by Mumford et al. (2020)[2], however, has demonstrated how this is not true of all centres, challenging existing retail hierarchies. Based on a statistical analysis (K-Means clustering) of over 10-years of footfall data across over 100 retail centres provided by Springboard, this research has found four distinct annual 'footfall signatures' that classify centres by activity levels, and how footfall varies over the months of the year.

The table below show what percentages of all the analysed towns (n=154) fall into each signature type. It can be seen that most town centres are multifunctional towns, followed by speciality, comparison, and finally holiday towns. By comparing 2019 with 2018, we can also see that the number of multifunctional towns is increasing. This is positive as research shows that multifunctionality is the best way forward. It usually means towns are more resilient.

	2019		2018	
Annual signature	Number of towns	% of towns	Number of towns	% of towns
Multifunctional	68	44%	56	36%
Speciality	43	28%	50	32%
Comparison	30	19%	33	21%
Holiday	13	8%	16	10%

Table 4.1.4 Percentage of towns that fall in each of the four annual signatures

4.1.1 Comparison towns

Comparison towns are the more traditional shopping centres, typically located in larger town and city centres. They are characterised by a footfall peak in December, coinciding with the Christmas preparation period. People come here predominantly to shop and travel a considerable distance to visit. These town 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.

[2] 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

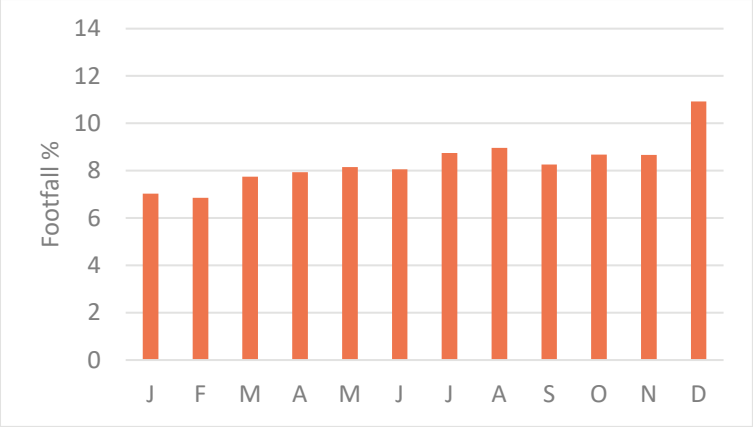


Figure 4.1.1 Yearly footfall pattern for Comparison towns

4.1.2 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. 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 comparison offer. E.g. Cleethorpes.

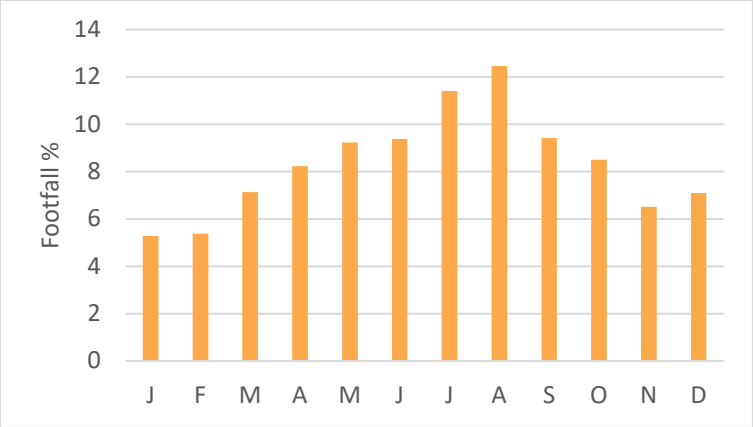


Figure 4.1.2 Yearly footfall pattern for Holiday towns

4.1.3 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 have anchors that are not linked to retail, and offer something unique and special, promoting a strong town identity. E.g. Windsor.

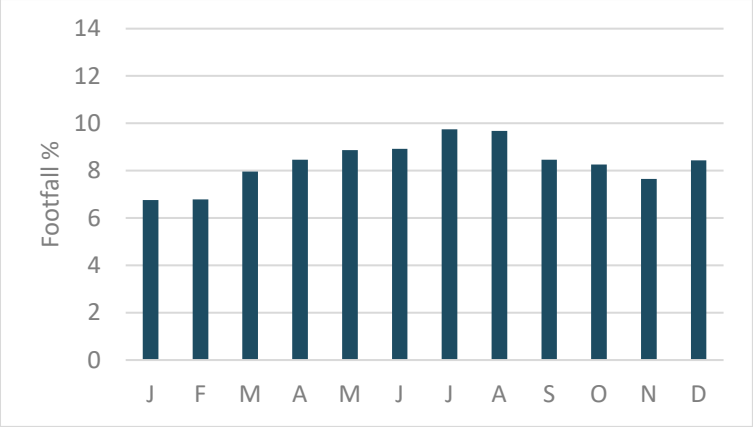


Figure 4.1.3 Yearly footfall pattern for Speciality towns

4.1.4 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) are drawing people from a wider area than the small multifunctional centres (towns) that are serving a local catchment (e.g. Ashford).

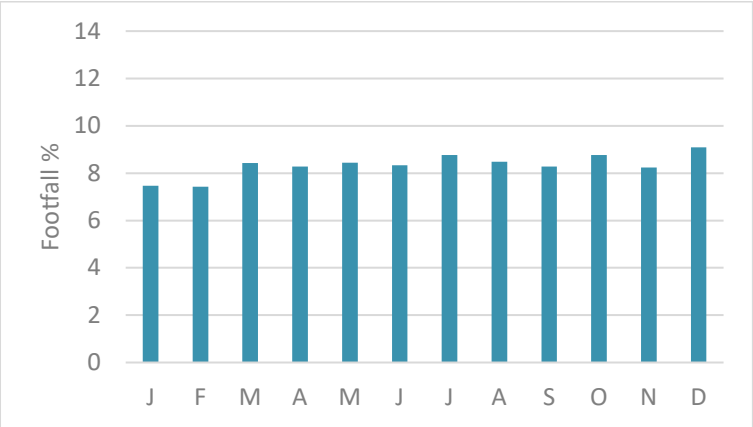


Figure 4.14 Yearly footfall pattern for Multifunctional towns

Additionally, Mumford et al. (2017) have examined footfall profiles for days of the week and hours of the day and discovered two distinct patterns for each of these.

4.2 Weekly signatures

There are two weekly footfall signatures that classify centres based on their activity levels throughout different days of the week; *Saturday peak* and *Monday through Saturday steady.*

Table 4.2 shows what percentages of all the analysed towns (n=154) fall into each signature type. It can be seen that there are slightly more towns that show a Saturday peak.

Weekly signature	Number of towns	% of towns
Saturday peak	93	60%
Monday through Saturday steady	61	40%

Table 4.2 Percentage (and number) of towns that fall in each of the two weekly signatures

4.2.1 Saturday peak

Saturday peak type towns (Figure 4.2.1) show a big peak on Saturday followed by a smaller drop on Sunday. Saturday peak tend to be smaller locations that are quiet in the week, e.g. Guisborough in North Yorkshire.

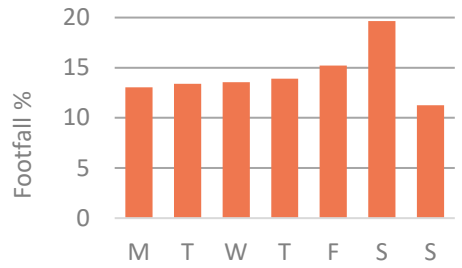


Figure 4.2.1 Saturday peak type towns

4.2.2 Monday through Saturday steady

Monday through Saturday steady type towns (Figure 4.2.2) show steady footfall from Monday to Friday with a slight peak on Saturday, followed by a large drop on Sunday. These towns tend to be busier in the week as employment centres, e.g. Reading.

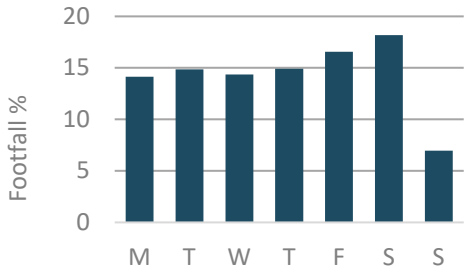


Figure 4.2.2 Monday through Saturday steady type town

4.3 Daily signatures

There are two daily footfall signatures that classify centres based on their activity levels throughout the hours of the day: *All day economy* towns and *midday economy* towns.

Table 4.3 shows what percentages of all the analysed towns (n=154) fall into each signature type. It can be seen that there are considerably more towns that function with a Midday economy.

Daily signature	Number of towns	% of towns
All-day economy	54	35%
Midday economy	100	65%

Table 4.3c Percentage of towns that fall in each of the two daily signatures

4.3.1 All-day economy

All-day economy (Figure 4.3.1) type towns show different activity peaks throughout the day. They have more customers towards lunch time and afternoon rush hour, and footfall volume differences are not as pronounced across different times of the day, e.g. Liverpool, which have a daytime, evening and night-time economy

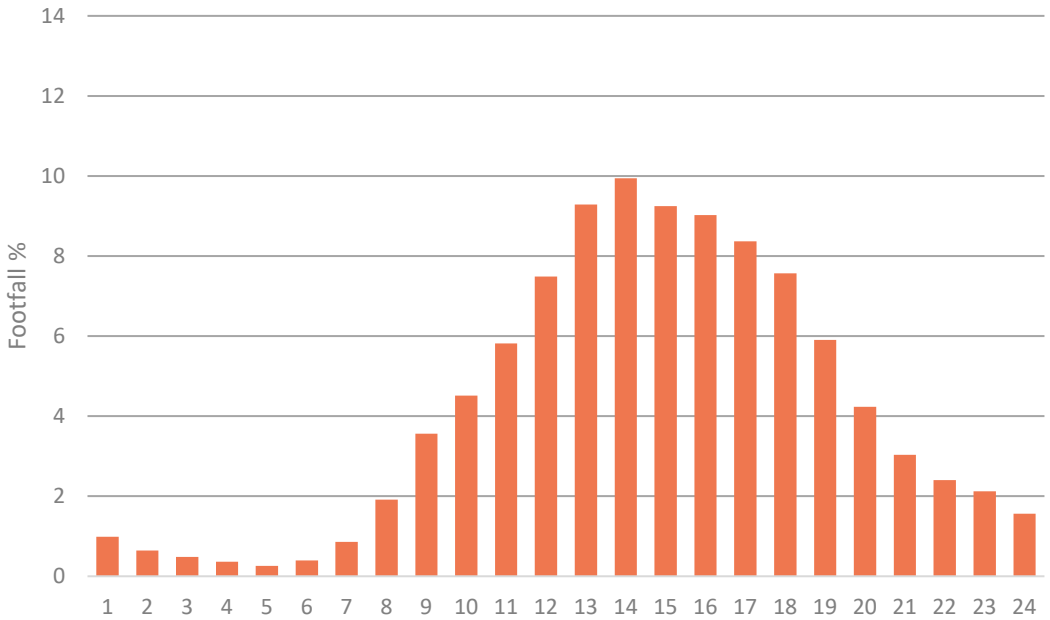


Figure 4.3.1 All-day economy town type footfall pattern across hours of the day

4.3.2 Midday economy

Midday economy (Figure 4.3.2) type towns show one clear activity peak around midday. These locations attract footfall based on their lunchtime offer, e.g. Holmfirth, and these towns are much quieter at night.

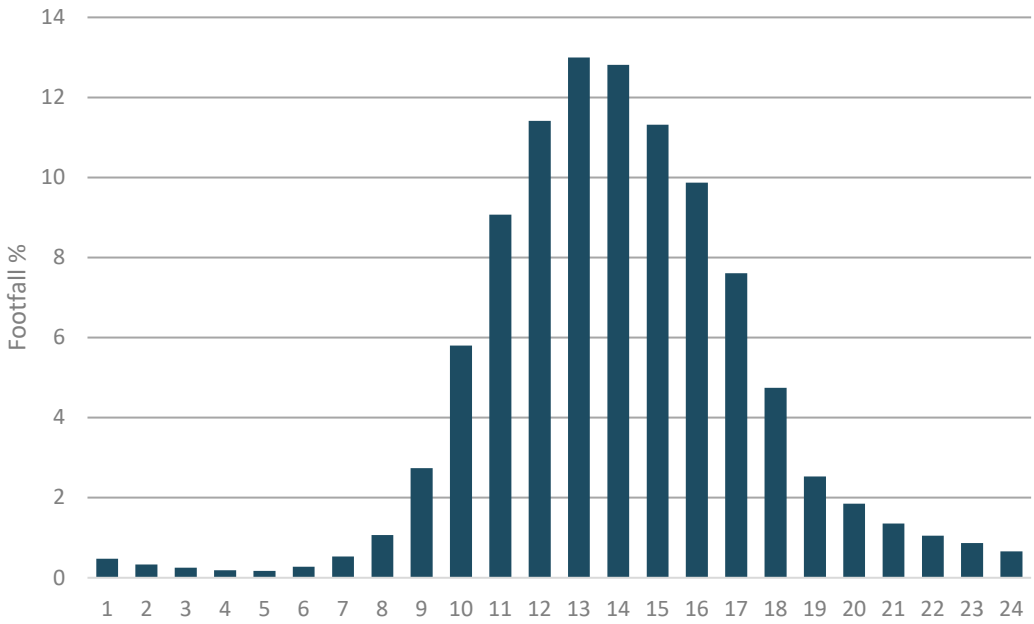


Figure 4.3.2 Midday economy town type footfall pattern across hours of the day

4.4 The activity hierarchy

Many local planning authorities designate their centres using a retail hierarchy: major city, regional centre, sub-regional centre, major town, town, and district. Research, however, shows that often there are no real differences when it comes to footfall volumes across neighbouring classifications (for example, between major towns and towns) (Mumford et al. 2020)[3], suggesting that this might not be the most suitable classification when dealing with place attractiveness and planning decisions.

A reduced 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. An activity hierarchy classifies centres into: major city, regional centre, town, and district (Mumford et al. 2020).

The process to classify a centre according to the activity hierarchy is twofold: first, look at the centre's annual footfall volume; and second, compare this with the mean footfall volume for each classification and the standard deviation, that is, how much footfall volume varies across centres in these groups. For example, if the annual footfall volume of a centre is 2,700,500, that means that it behaves as a 'town' in terms of their footfall activity.

Figure 4.4a shows a representation of the activity hierarchy.

[3] 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

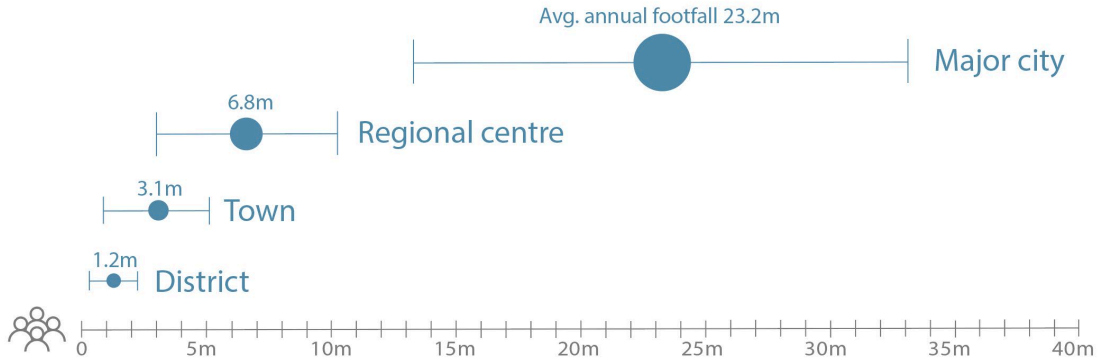


Figure 4.4a Levels of activity hierarchy and average as well as standard deviation of annual footfall of the towns in each level of the hierarchy.

Table 4.4a is an alternative representation of the figure 4.4, showing the mean and standard deviation of the groups of towns in each level of the activity hierarchy.

Activity hierarchy	Mean (million)	SD (million)
District	1.2	0.9
Town	3.1	2.2
Regional Centre	6.8	3.7
Major City	23.2	9.9

Table 4.4a. Mean and standard deviation (SD) of the groups of towns in each level of the activity hierarchy.

Figure 4.4b shows what percentages of all the analysed towns in England (n=153) fall into each level of the activity hierarchy.

Activity hierarchy	Number of towns	% of towns
District	9	6%
Town	76	50%
Regional centre	57	37%
Major city	11	7%

Table 4.4b Percentage of towns that fall in each of the levels of the activity hierarchy

We have also explored the mismatch between planning designation and activity, that is, we have compared the planning designation of towns in our data set with our activity level, or the amount of footfall they attract. We think this is important as the planning designation will be defining the function of the town, and what is expected in terms of the offer. Over a quarter of towns in our dataset may be setting visions and plans that are, perhaps, unachievable. Towns that have a 'sub-regional' classification, but where footfall is considerably lower than would be expected, are especially prone to being convinced that more retail or commercial development is the way to regain their status. Serving their local population and being a multifunctional hub is, a more achievable route to sustainability, generating a lower but stable level of footfall.

In our analysis we find that 64% of towns are congruent across their planning designation and activity levels; 10% of towns are busier than their planning designation would suggest; and that 26% of towns are quieter than their planning designation would suggest. For example, the annual footfall in Halifax is just over 1m but has been designated as a Sub-Regional Centre; Harpurhey (in Manchester) has been designated as a District but with annual footfall of nearly 3m; and Shrewsbury is designated a Major Town but with footfall of nearly 9m (the footfall expected from a Regional Centre).

Finally, we have also look at town types and the activity hierarchy. As you can see in Figure 4.4b, most districts are multifunctional, and some are speciality, meaning they have heritage and culture as well as the everyday services. Towns are a mixture, but they are more likely to be multifunctional or specialty. There are, however, some smaller holiday towns and comparison shopping centres too. The regional centres are still more likely to be multifunctional than anything else, but we see more comparison towns and cities at this level. Finally, the major cities are most likely to be our comparison shopping centres. Over the last 10 years we have seen multiple retailers shift to these centres, closing stores in the towns and even regional centres.

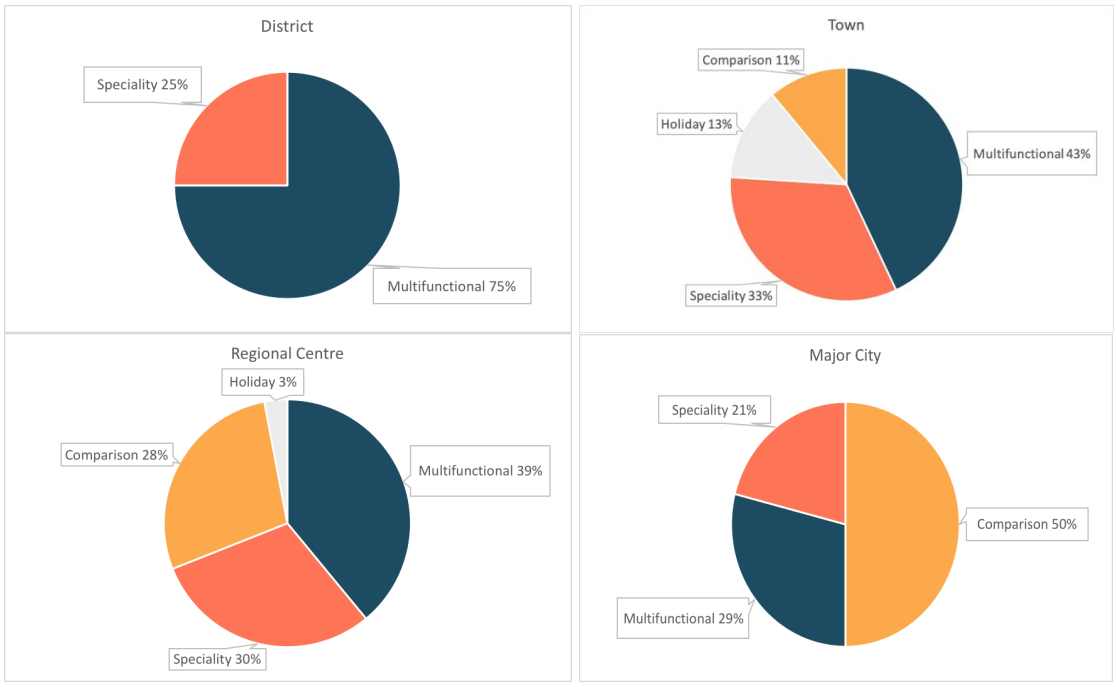


Figure 4.4b Relation between the four main town types or signatures, based on annual footfall patterns, and the different levels in the activity hierarchy, based on footfall volumes.

5. Unexpected footfall events

Unexpected footfall events include factors such as: weather and major sporting events etc. In order to identify unexpected footfall events, we forecast the footfall for the year ahead and then compare it with actual footfall data, to see if anything unexpected has happened. Understandably, COVID-19 has been the most significant unexpected event this past year. More explanation of our forecasting methods is given in the method section (1.2)

Figure 5 illustrates clearly how the forecast for 2020 (blue) differs from the actual footfall (black) up to the end of January 2020, where a large drop is observed, due to the unexpected event of COVID-19. However, we can observe that in the early part of 2020, the actual footfall and the forecast match very well.

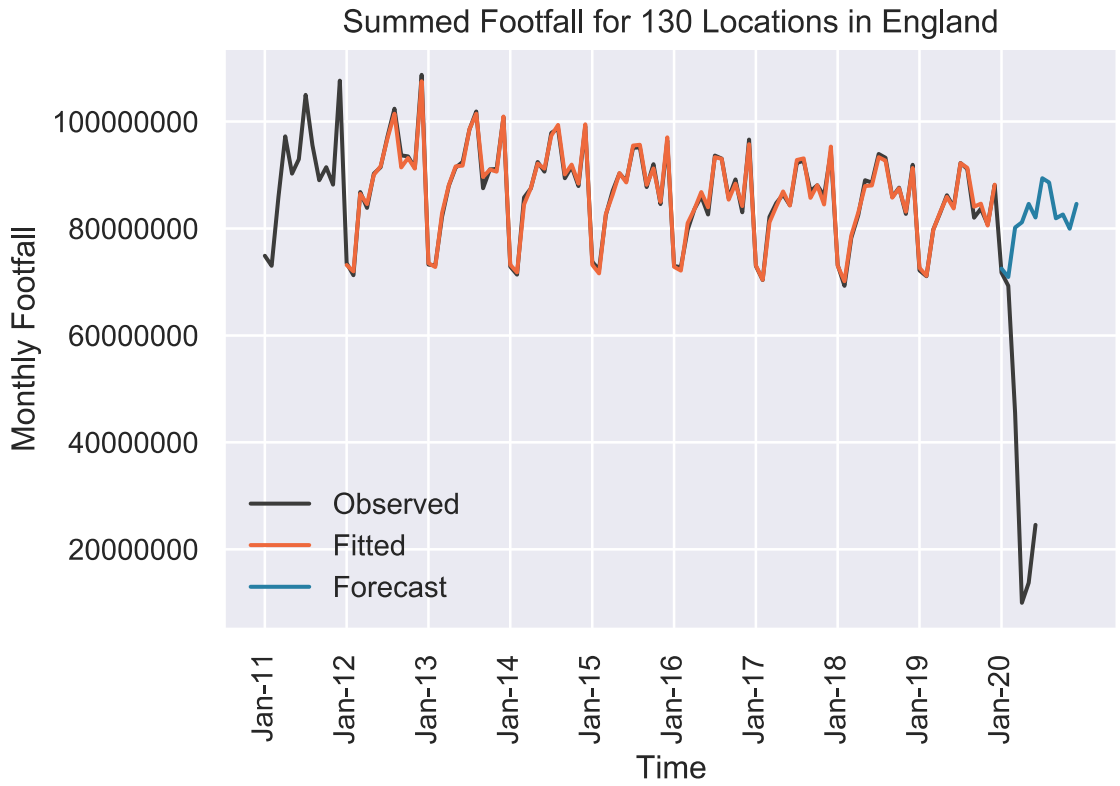


Figure 5. Forecast for 2020 based on footfall data from Jan 2011 to Dec 2019 (blue), versus actual recorded footfall (black).

6. Footfall and COVID-19

This section looks at the impact of COVID-19 on footfall levels and patterns. To set some context, in Figure 6a we present the % change in footfall, in England, from 1st March 2020 to 30th June 2020. On the 28th March 2020, footfall fell to its lowest level, down 89.86% compared to the same day last year. The opening of non-essential retail on the 15th June 2020 generated the highest levels of footfall seen in England, after lockdown. On this day, footfall was down 50.89% compared to the same Monday in 2019.

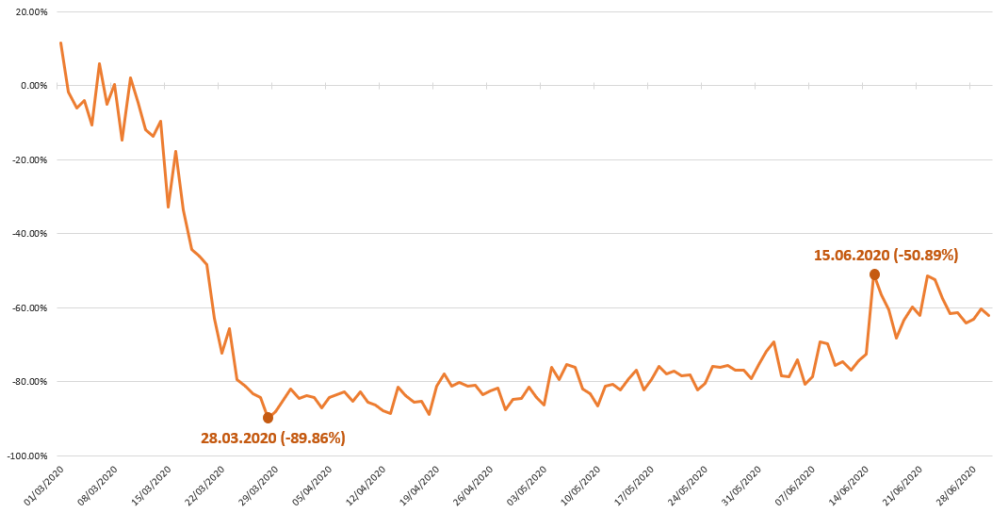


Figure 6a English Footfall 1st March 2020 to 30th June 2020 (compared to 3rd March to 2nd July 2019)

Figure 6b shows the % change in footfall across the different town types identified in the previous section (comparison, holiday, speciality and multifunctional).

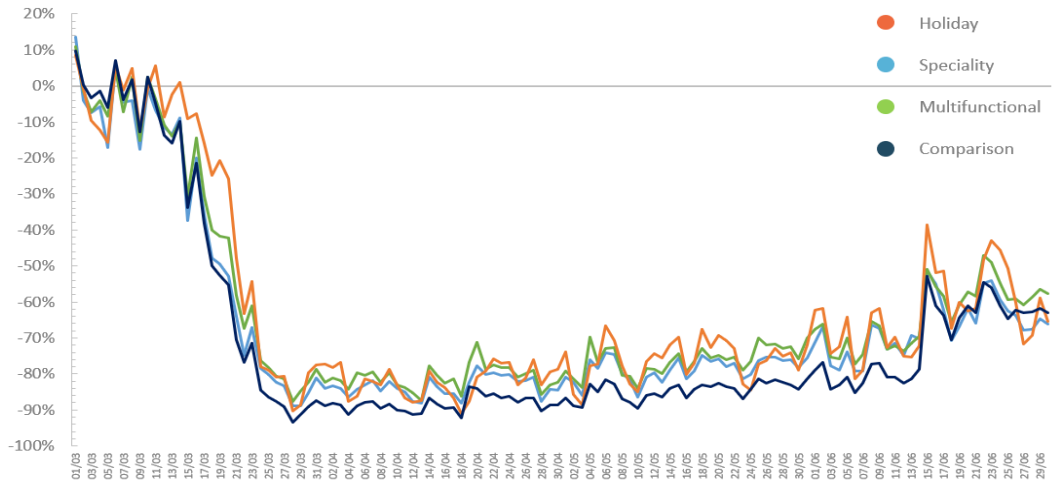


Figure 6b Footfall across 4 town types 1st March 2020 to 30th June 2020

As Figure 6b shows, comparison towns have consistently seen the biggest decline in footfall. From the 23rd March to the 30th June, footfall has been, in comparison towns, on average, -81.7% of the corresponding time period. During the same time period, footfall in multifunctional towns has been -74.1%, with speciality and holiday towns -76.87% and -74.2% respectively. Holiday towns show the greatest variation as the weather has more of an impact on people's decision to visit.

Figure 6c shows the % change in footfall across the different levels of the activity hierarchy (major city, regional centre, town and district). Differences relating to the size of town (rather than the type of town) are more pronounced. Average daily footfall fell by 75.94% in major cities, 64.96% in regional centres, 52.87% in towns and 34.55% in district centres.

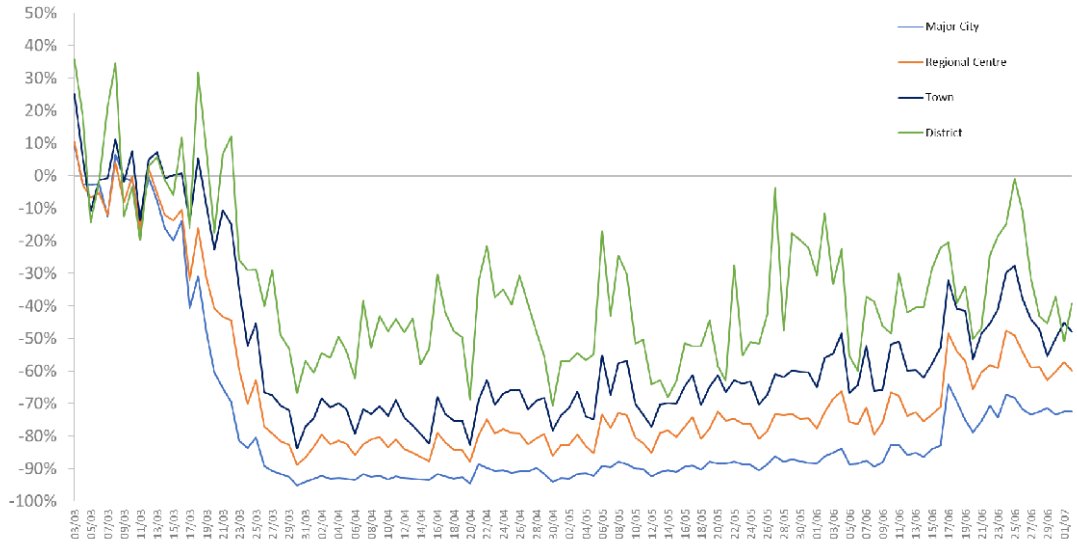


Figure 6c Footfall across 4 activity levels, 1st March 2020 to 30th June 2020

6.1 Footfall and COVID-19 related key dates

Although footfall levels have been consistently low during lockdown, there have been some oscillations around key dates and announcements. The graph below shows how there were two footfall peaks immediately following the Prime Minister's announcement and the beginning of lockdown. It's likely that many people were preparing for lockdown by going shopping and spending some time outdoors. Another peak can be seen around Easter, and this decreases again when the extension of lockdown was announced. Similarly, the opening of non-essential shops and pubs also produced an increase in footfall levels.

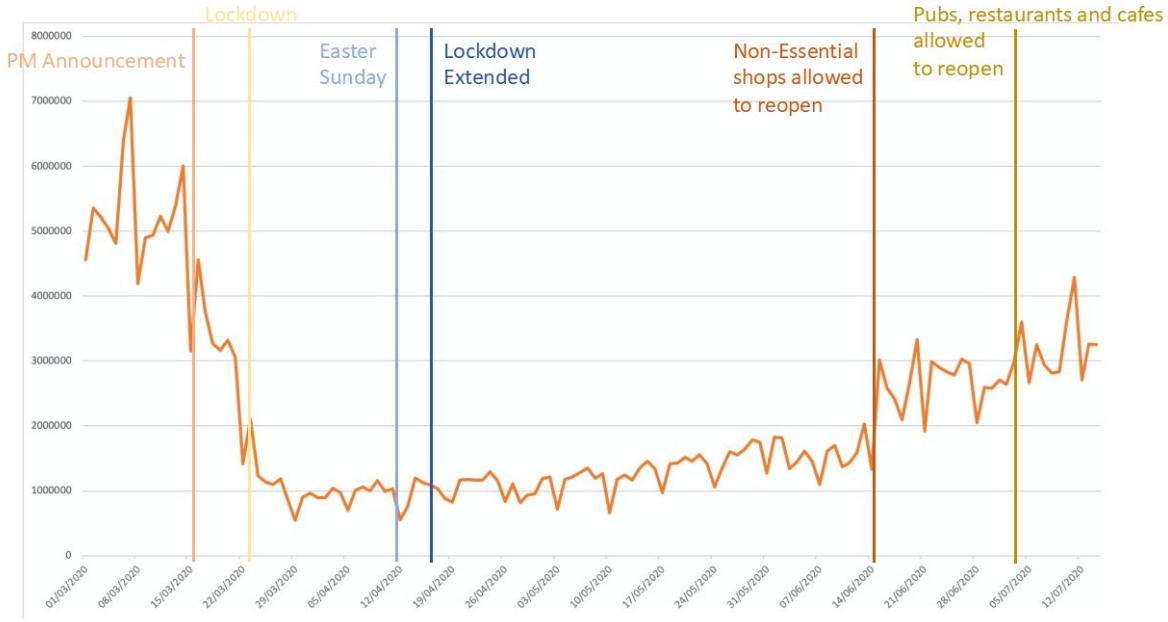


Figure 6.1 Footfall patterns and specific COVID-19 related events.

6.2 Weekly and daily footfall patterns during COVID-19

We have also looked at footfall patterns, not just levels, and explored whether these have changed following the pandemic, that is, during lockdown and after non-essential shops were allowed to open.

The graph below shows a week after lockdown was announced (23rd March). You see the pattern is flatter over the week, which we observed has been consistent through lockdown. It is close to 'Monday through Saturday steady' signature, but Saturday is no longer the busiest day of the week.

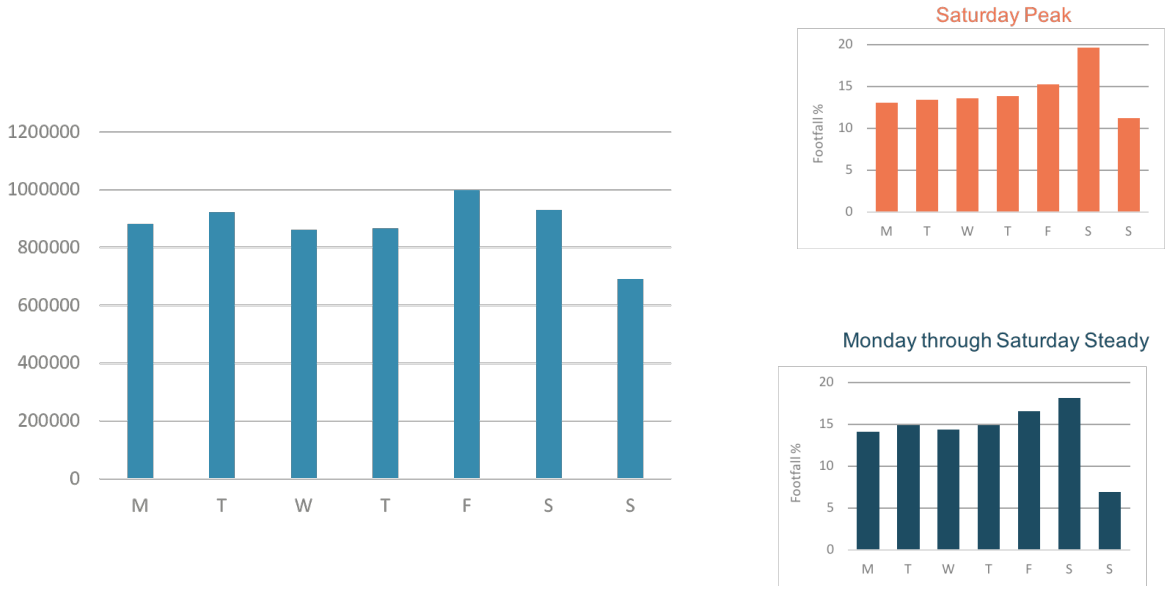


Figure 6.2a Weekly signatures from 30th March – 5th April (2020) and comparison with Saturday Peak and Monday through Saturday Steady signature types.

Below is a week after non-essential retailing opened (15th June). Saturday is still not the busiest day. Perhaps this will no longer be the case if more people work from home and use their local centre, as it might be as convenient to pop out on a Monday or a Friday, as it was on Saturdays.

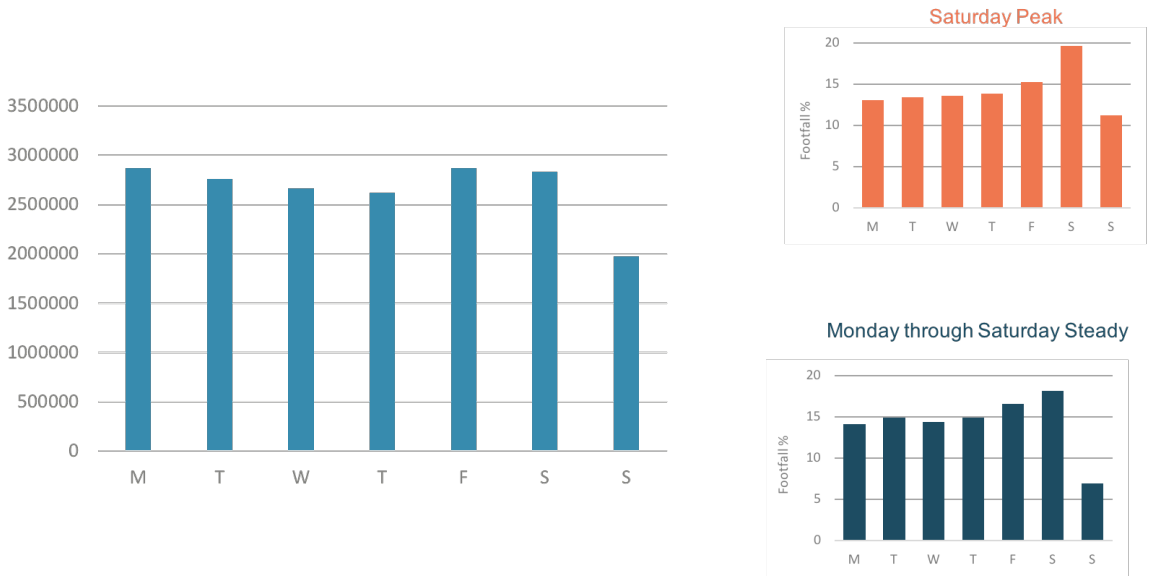


Figure 6.2b Weekly signatures from 22nd June – 28th June (2020) and comparison with Saturday Peak and Monday through Saturday Steady signature types.

The figure below shoes a typical day during lockdown (after 23rd March when lockdown was announced). We chose a Tuesday because, pre-COVID19, Tuesdays used to be 'typical days' as they did not show the same variation of footfall as Friday, Saturday and Sunday. The daily signature shows how people are going out earlier, probably visiting food stores and perhaps with the idea to miss the rush. Evenings and night times have become much quieter as there was nothing open to visit.

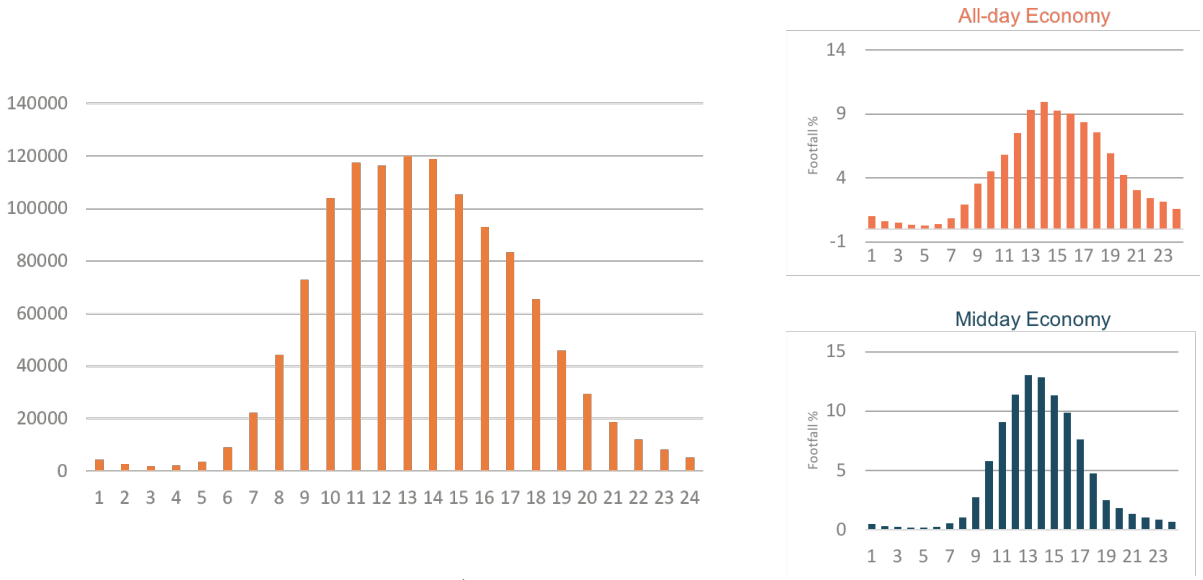


Figure 6.2c Daily signatures on Tuesday 24th March (2020) and comparison with All-day and Midday economies.

In the figure below you can see a typical day after non-essential shops reopened (15th June). As you can see, towns extend their busy period later into the afternoon and we start to see more of the all-day economy town types.

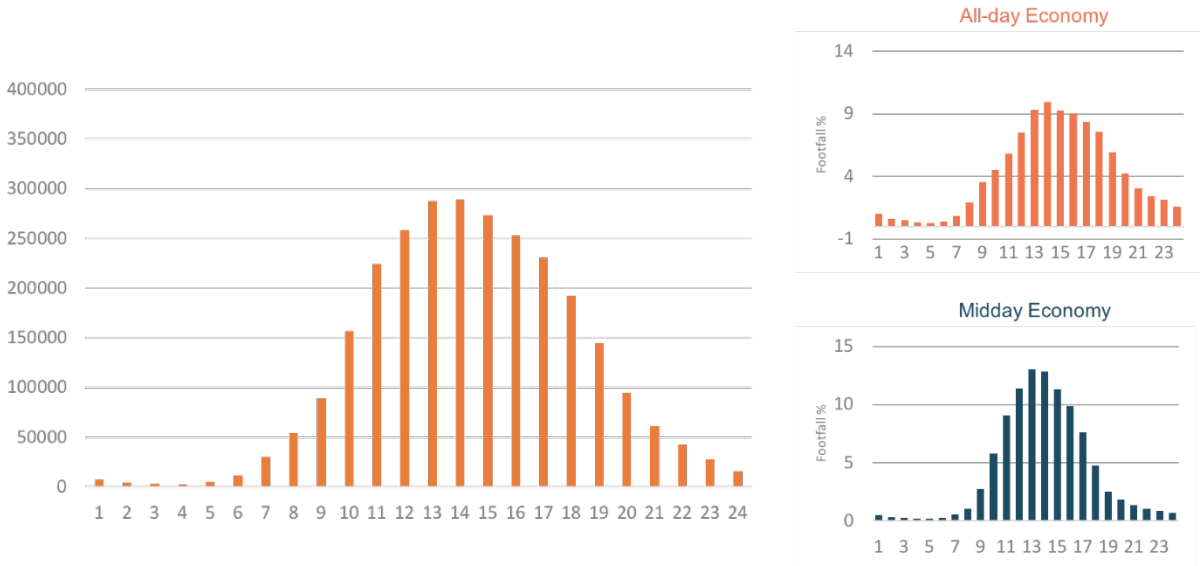


Figure 6.2d Daily signatures on Tuesday 23rd June (2020) and comparison with All-day and Midday economies.

6.3 Exploring footfall recovery

Further to understanding footfall performance during lockdown, we are also interested in what is happening to high streets, once lockdown measures are eased. This is to help us understand how different attractions opening up may impact on footfall. In Figure 6.3.1, the dark orange line plots what might have happened to footfall if lockdown was extended. Footfall was 'creeping up' anyway, as some people reached their stay at home 'threshold'.

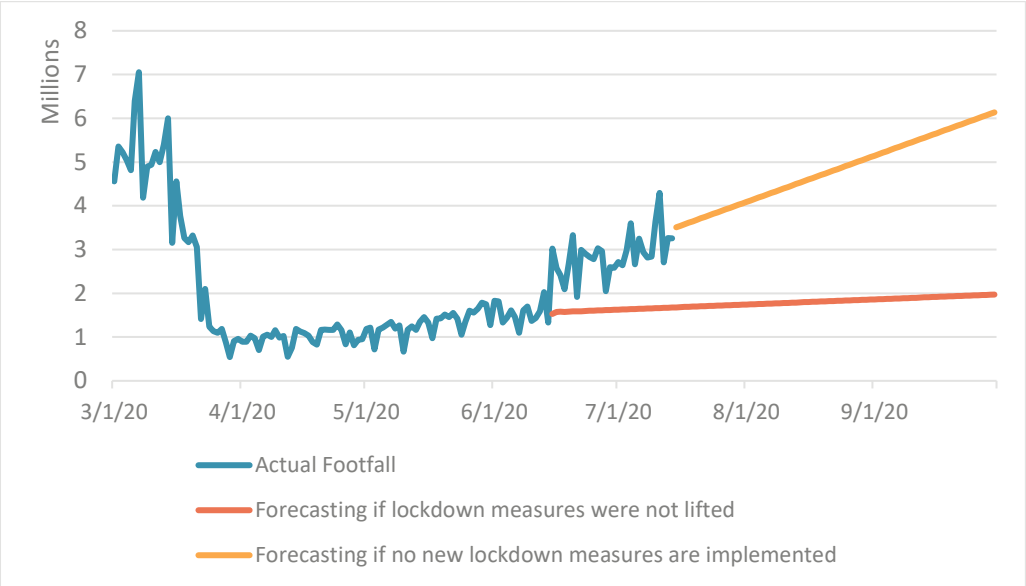


Figure 6.3a Forecasting footfall after COVID-19, in lockdown as well as in opening up scenarios.

The yellow line forecasts how footfall might increase if only retail could open. We would expect actual footfall figures to be higher than this yellow forecasted level, as bars and restaurants etc. were allowed to open on 4th July 2019. In fact, Figure 6.3b shows this higher peak, on Monday 4th July, when hospitality re-opened.

Figure 6.3b also illustrates a linear trend line extrapolated from footfall data, since non-essential retail opened on the 15th June. This suggests we might expect footfall to return to 2019 levels sometime in early November, based upon extrapolating a linear trendline generated from footfall data from 15th June 2020 until 16th August 2020 and looking at where this intercepts a trendline developed from 2019 data (29th June 2019 to 27th December 2019).

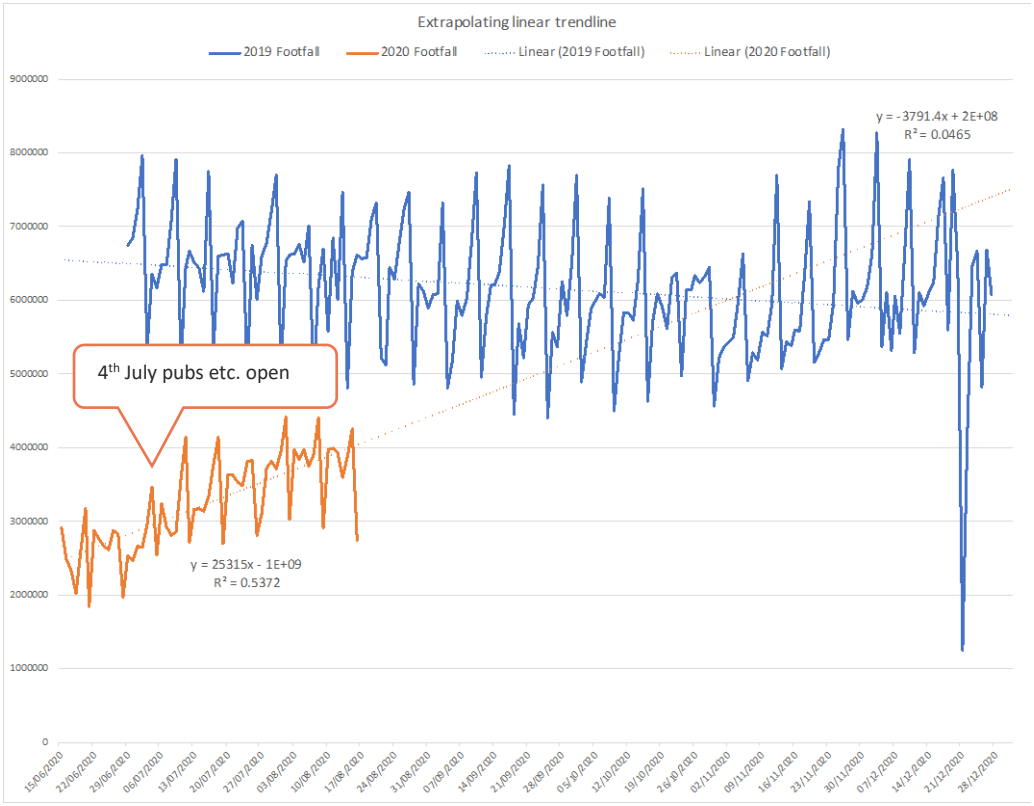


Figure 6.3b Developing a linear trendline from 2020 footfall data showing comparison to 2019 levels

We think, that this forecast is overly optimistic for a number of reasons. First, there will have been a certain amount of 'pent-up' demand which may have brought more visitors to the high street immediately after lockdown measures were eased. Second, social distancing and other preventative measures do put a capacity limit on businesses, public transport and high streets themselves. Whilst these measures are in place, it may not be possible for high streets to have the 'carrying capacity' suggested by the trendline. Third, many people have changed their behaviour, by switching to on-line shopping or working from home, for example, and some of these switches may be permanent, thereby reducing footfall to the high street. Finally, more local 'lockdowns' will impede the recovery of locations affected. Nevertheless, we think it is useful to produce these trendlines to help us understand the recovery process, the impact of the easing (or reimplementation) of lockdown measures and, ultimately, establish what the 'new normal' for footfall might be.

7. COVID-19 recovery case-studies

Four location specific case studies have been conducted to understand the changes in high street activity following the reopening of non-essential stores on 15th June 2020. The case studies demonstrate how the rate of recovery post-COVID-19 depends on the characteristics of the location, highlighting specific issues that influence this recovery.

In order to understand the impact of reopening on different types of locations, the analysis was conducted across towns that represent each of the four different town types:

1. Manchester - Comparison Town
2. Windsor - Speciality Town
3. Ashford - Multifunctional Town
4. Cleethorpes - Holiday Town

For each town, the following questions were investigated:

1. To what extent did the new guidance on 15th June translate into an increased footfall for the high street area?
2. How has the demand profile changed compared to the pre-COVID-19 normal?

In order to understand changes in behaviour in each town and to answer the questions laid out in our objectives, the following analyses were undertaken:

- Footfall monitoring and mobile data capture
- Shopper segmentation
- Demand profile analytics
- Land use analysis
- Social media sentiment and trend analysis

Full detailed of the method employed can be found in Section 1.2.

7.1 Key findings

The four towns have each seen varied results in terms of the impact of lockdown, as well as in the pace of recovery post-lockdown. The case studies identified the following characteristics as being important in determining how quickly high streets are able to recover post-lockdown:

- The extent to which the location relies on demand from indoor shopping centres, which are recovering more slowly in our case-study examples.
- The land use of the high street is also important, with more dense retail areas recovering faster while areas with a larger proportion of office land are not recovering as quickly.

- The extent to which the high street relies on local demand (within 5km) is an important factor, with fewer people travelling longer distances.
- Overseas demand contributed as much as 21% of footfall for some high streets during the baseline period, with this demand now much reduced.
- Natural assets, such as the seaside, prove popular – with dwell time in Cleethorpes at least half an hour longer than in the other case-study towns.

Social media analysis showed that successful local businesses kept customers continually updated about opening hours, delivery options, online stores and promotions, for example. Posts about "reopening" were found in the data as early as May, with the sentiment of all posts generally increasing in the weeks approaching June 15th.

Across all the towns in our study, the demand profile and behaviour patterns for high streets are changing. Demand has generally moved to later in the day, away from the weekends and towards shorter and more focussed visits. Our findings demonstrate how a town's annual footfall signature and the nature of its baseline demand strongly influences its recovery journey. This is explored further in our detailed findings below.

7.2 Manchester

Central Manchester is a Comparison Town. As defined in section 4.1, these are major shopping destinations and people will travel a considerable distance to visit. It is also an important business and educational hub, with a high proportion of offices and three universities. Footfall in Central Manchester was impacted the most out of the four towns in our study, falling to -81% of baseline levels in April and recovering to -35% in July.

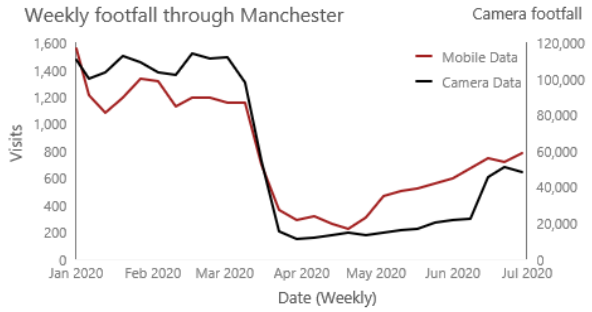


Figure 7.2a: Weekly footfall through Manchester in 2020

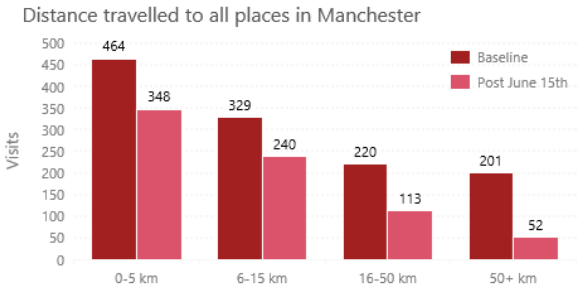
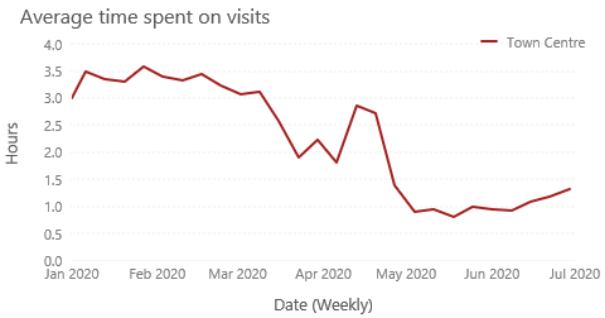


Figure 7.2b: Distance travelled to Manchester in baseline period vs. post June 15th



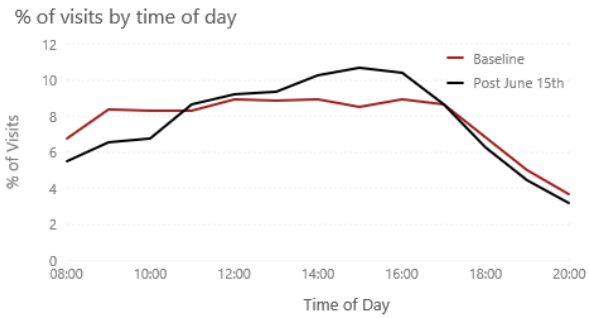
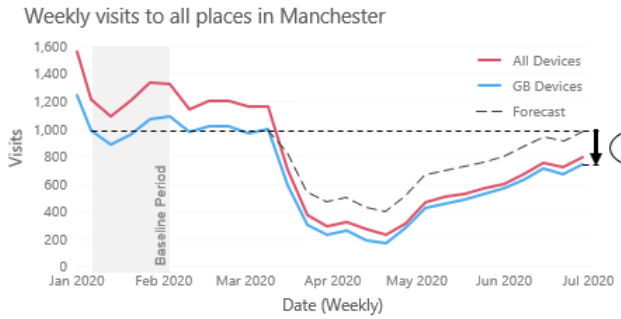


Figure 7.2c: Average time spent on visits to Manchester in 2020

Figure 7.2d: Proportion of visits to Manchester by time of day in baseline period vs. post June 15t

While footfall is gradually returning to baseline levels, the demand profile has changed: the mornings are now quieter in Manchester, with more high street activity occurring between 14:00 and 17:00. The average time spent per visit has also halved.

Visits to the high street are coming from closer distances than before, with a reduction in those travelling from over 50km away.



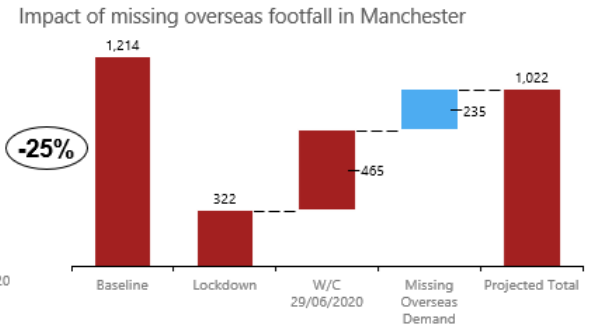


Figure 7.2e: Weekly footfall through Manchester in 2020 split by GB registered devices and all devices

Figure 7.2f: Projected footfall if overseas demand was retained post-lockdown.

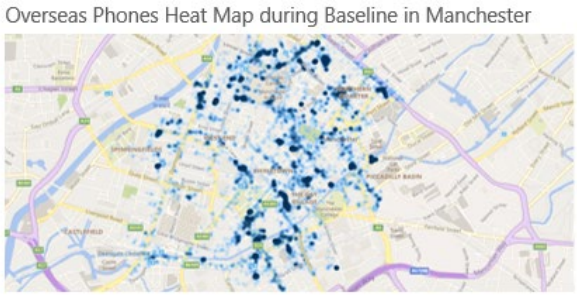


Figure 7.2g: Baseline activity from overseas phones in Manchester

Figure 7.2h: Baseline activity from overseas phones w/c 29/06/2020

Footfall from non-GB devices has fallen faster than local footfall since lockdown came into effect (Figure 7.2e). In particular, the missing overseas footfall since lockdown accounts for over half of the difference between current footfall levels and footfall in the baseline period (Figure 7.2f).

Figures 7.2g and 7.2h show the difference in activity patterns for overseas visitors between the baseline period and the end of July. Footfall was distributed fairly evenly across central Manchester, with offices and hotels showing up as common hotspots. However, overseas footfall is now primarily centred around specific locations that include transport hubs and student accommodation.

Figure 7.2i: Heat Map of activity in Manchester on w/c 29/06/2020.

In Manchester, the pace of recovery has varied widely across the high street. Areas that have recovered further include:

1. Main outdoor shopping areas with a high density of retailers. For example, Market Street where footfall has returned to 68% of the baseline.
2. High street areas near transport hubs such as bus stops, tram stops and train stations. For example, the north end of Portland Street has a large bus stop where footfall is concentrating.

While areas that have recovered less include:

3. High streets with a large proportion of office space, for example, Princess & Portland Streets where footfall has recovered to 38% of baseline levels.
4. Indoor shopping centres such as the Arndale Centre, which is at 36% of baseline footfall.

7.2.1 Comparing footfall to 2019 levels in Manchester

Footfall levels for each town have also been compared on a monthly basis to footfall during the previous year. This highlights the impact of any seasonal footfall trends, showing the fall in footfall due to COVID relative to the same period 12 months ago. Comparing 2020 footfall in Manchester to 2019 figures shows that footfall in the town has been down significantly, compared to 2019 levels (Figure 7.2.1). However, the busiest time of the year, for comparison centres like Manchester is November and December, as shown in the graph below. It remains to be seen what impact COVID-19 will have on Christmas in Manchester, a major trading period for the city, which relies on the popular Christmas markets to attract visitors from across the region.

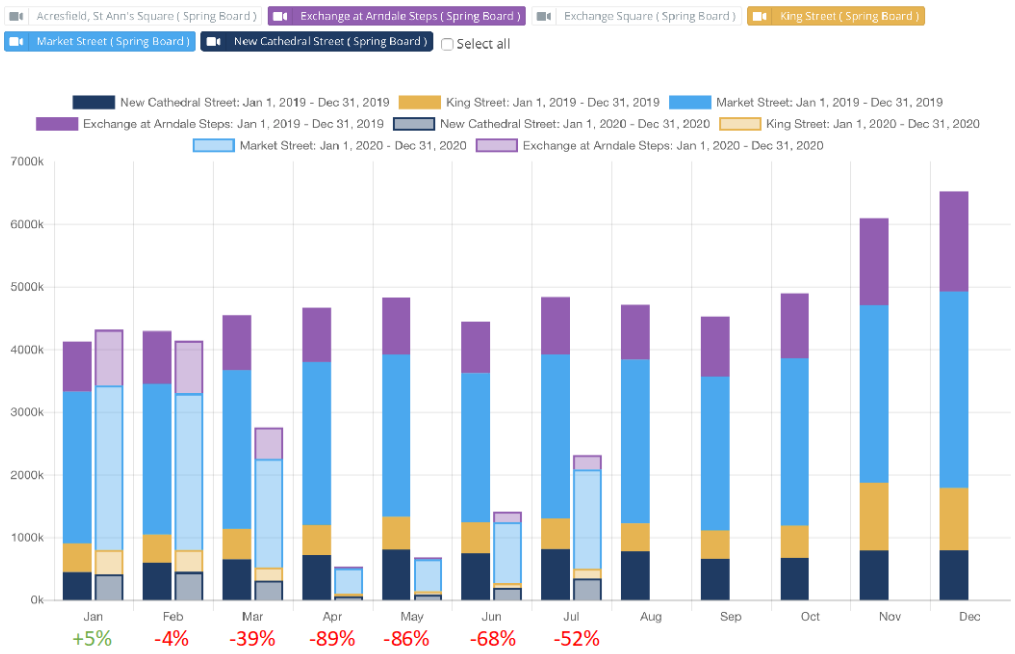


Figure 7.2.1 Comparing 2019 to 2020 footfall data for Manchester

As we have seen throughout this report, it is the bigger centres, like Manchester, that have suffered the most impact, and this is reinforced in Table 7.2.1, as after March, Manchester has a larger drop in footfall than the monthly comparison figure derived from the footfall of all towns combined. As a major shopping destination Manchester lost a major attraction once non-essential retail had to close in March. Even once non-essential retail opened again in mid-June, many shoppers have not returned, for a myriad of reasons. Likewise, office workers, students and visitors – other generators of footfall - are also not present in the city, in their pre-COVID numbers.

	Mar 20 v Mar 19	Apr 20 v Apr 19	May 20 v May 19	Jun 20 v Jun 19
All towns	-40.5%	-84%	-79.3%	-66.5%
Manchester	-39%	-89%	-86%	-68%

Table 7.2.1 Comparing month by month comparisons – Manchester and all towns

7.3 Ashford

Ashford falls into the multifunctional town type and its high street area serves a variety of needs, particularly shopping and employment. Compared with the other towns in our study it has seen the slowest recovery with footfall currently sitting at 47% below the baseline level. This is somewhat at odds with multifunctional towns, overall – which have tended to see less footfall decline than the comparison centres.

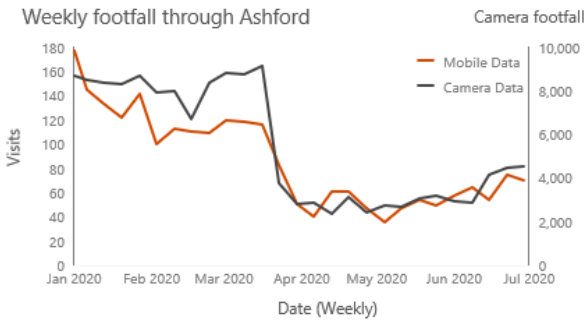


Figure 7.3a: Weekly footfall through Ashford in 2020

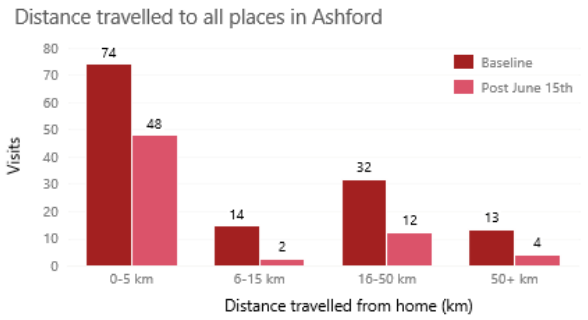


Figure 7.3b: Distance travelled to Ashford in the baseline period vs. post June 15th

Figure 7.3c: Average time spent on visits to Ashford in 2020

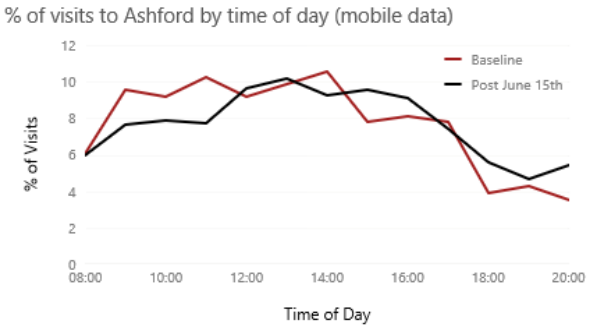


Figure 7.3d: Proportion of visits to Ashford by time of day in baseline period vs. post June 15th

As in Manchester, the average time spent per visit to the high street has halved compared to the baseline period. Fewer visitors are travelling more than 5km to the high street area, with footfall also down from visitors within 5km, showing that Ashford has failed to capture its local demand. Ashford is also less busy in the mornings now compared to the baseline.

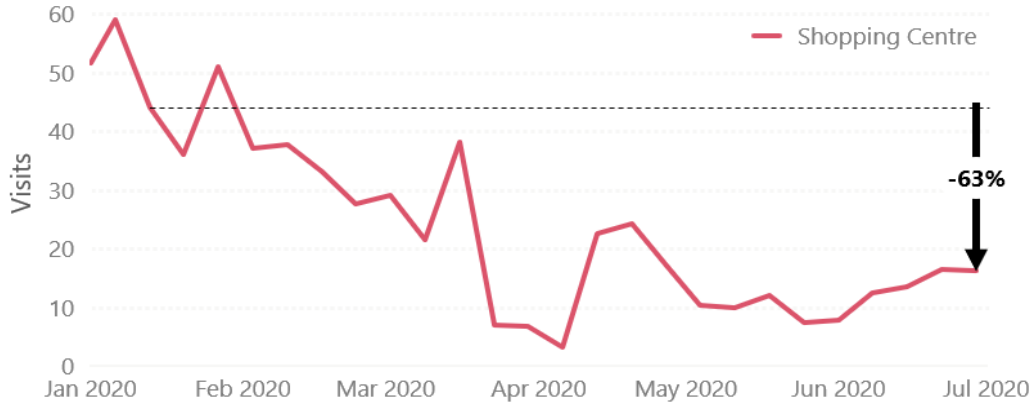


Figure 7.3e: Weekly visits to County Square Shopping Centre in Ashford in 2020

22% of footfall during the baseline period in Ashford was driven by visits to the County Square Shopping Centre. However, the closure of a major department store in the shopping centre as well as an increasingly cautious public have meant that footfall to the shopping centre is recovering even slower than the rest of the town. Footfall is down 51% in the rest of Ashford, while the shopping centre footfall is 63% below the baseline.

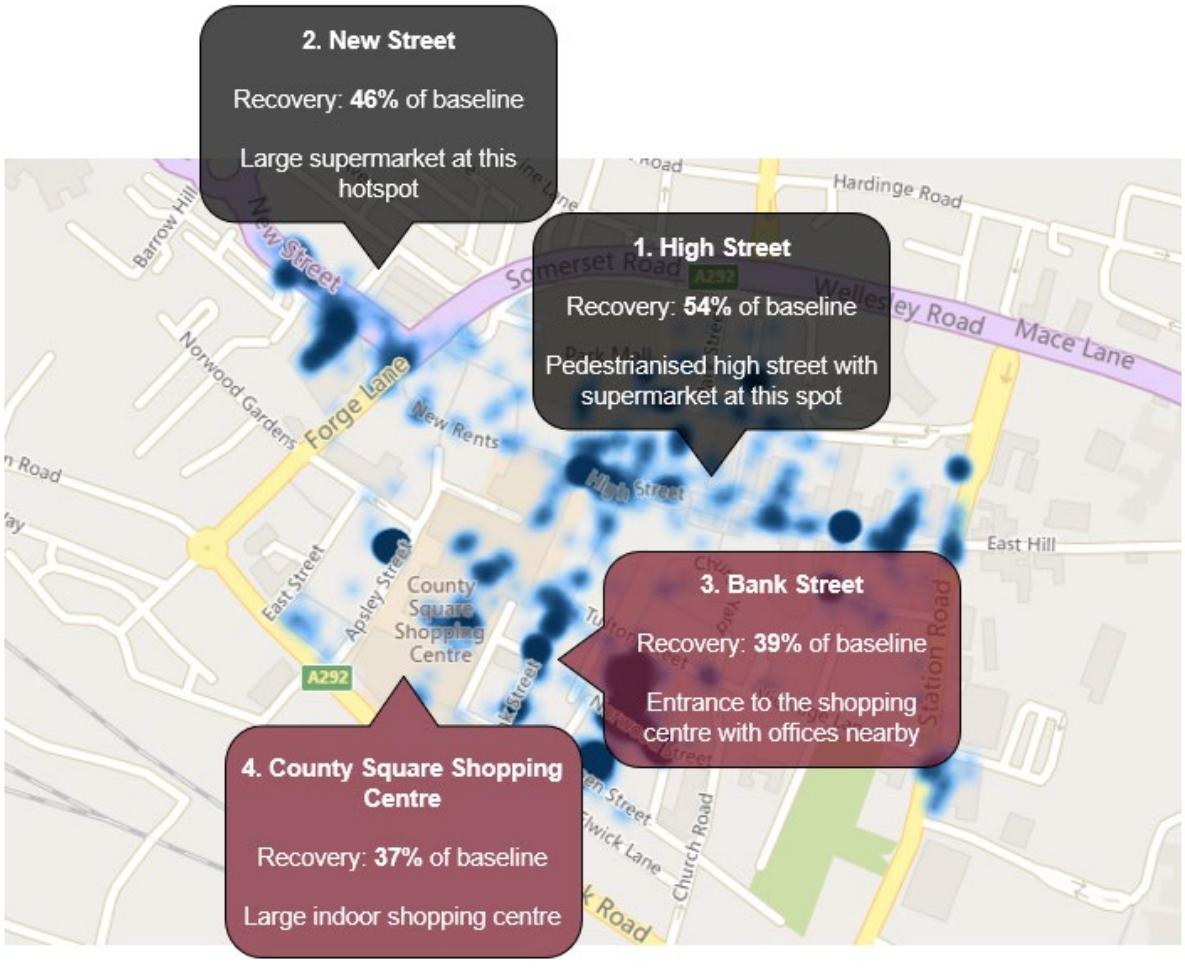


Figure 7.3f: Heat Map of activity in Ashford on w/c 29/06/2020

The areas that have seen a better recovery in Ashford include:

1. Main outdoor shopping areas with a high density of retailers and essential stores. Footfall on the High Street is back to 54% of the baseline, with hotspots around essential stores.
2. Major supermarkets, such as on New Street, which has seen a recovery to 46% of baseline footfall.

While the areas that have recovered less include:

3. Areas with a large number of offices such as Bank Street, which has only recovered to 39% of baseline footfall.
4. Indoor shopping centres such as the County Square Shopping Centre, which is at 37% of baseline footfall.

7.3.1 Comparing footfall to 2019 levels in Ashford

As a multifunctional town, Ashford would be expected to have fairly steady footfall throughout the year, with no significant peaks and troughs. In this respect, the pre-COVID baseline established is fairly indicative of footfall levels throughout the year, although January does tend to be a 'quiet' month, even for multifunctional towns. This is illustrated in Figure 7.3.1.

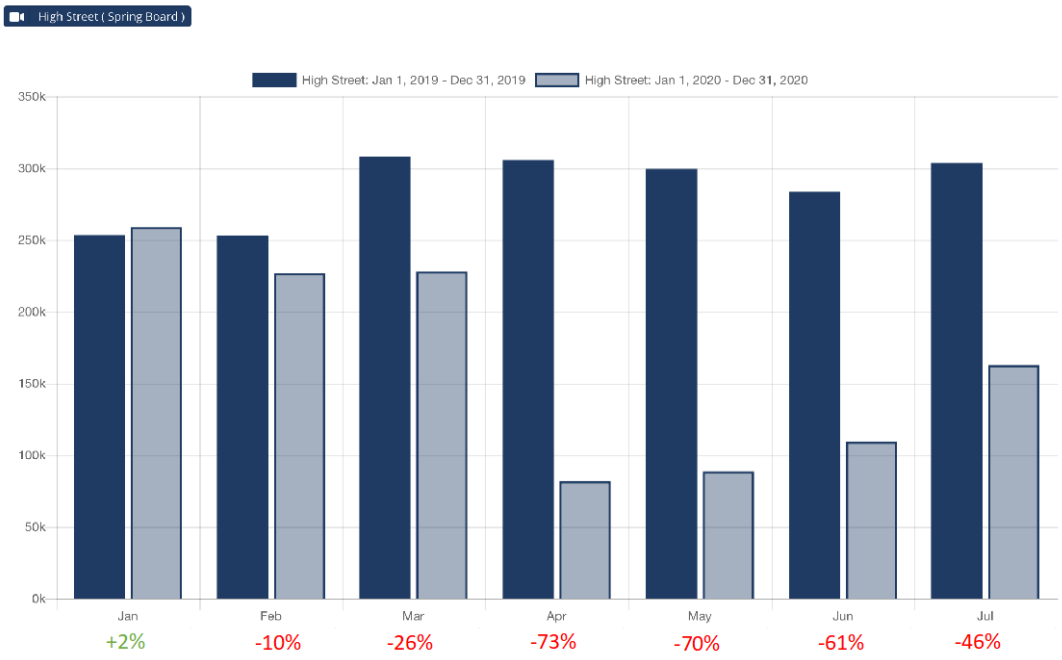


Figure 7.3.1 Comparing 2019 to 2020 footfall data for Ashford

Nevertheless, although footfall is down significantly, from March it has not fallen as low as the month-by-month comparisons we reported in Section 2 for all towns (Table 7.4.1). In this respect, the path to recovery is probably not as steep for Ashford, as a multifunctional town. Understanding and serving the needs of the local catchment is likely to hasten the pace of recovery.

	Mar 20 v Mar 19	Apr 20 v Apr 19	May 20 v May 19	Jun 20 v Jun 19
All towns	-40.5%	-84%	-79.3%	-66.5%
Ashford	-26%	-73%	-70%	-61%

Table 7.3.1 Comparing month by month comparisons – Ashford and all towns

7.4 Cleethorpes

Although Holiday Towns provide entertainment and leisure that people would often travel for, our analysis has found that the Cleethorpes high street mostly serves the local catchment, demand from which has held up well post-lockdown. There are notable increases in footfall in the town during days with good weather conditions, particularly seen by the camera located on the Promenade near the beach.

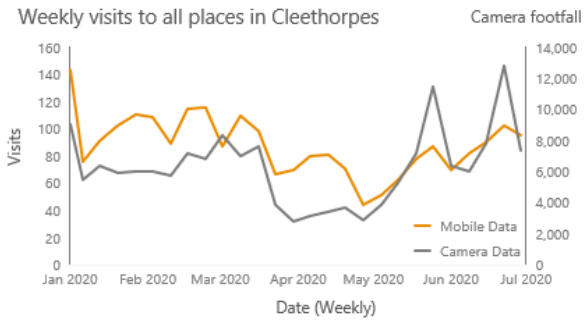


Figure 7.4a: Weekly footfall through Cleethorpes in 2020

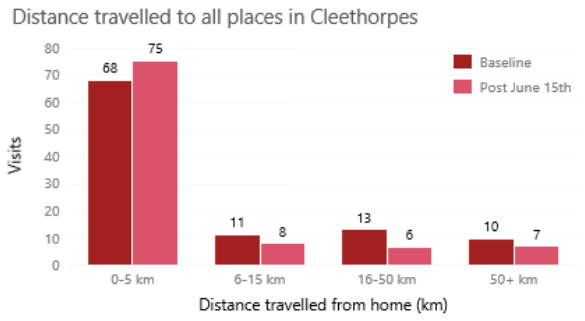


Figure 7.4b: Distance travelled to Cleethorpes in baseline period vs. post June 15th

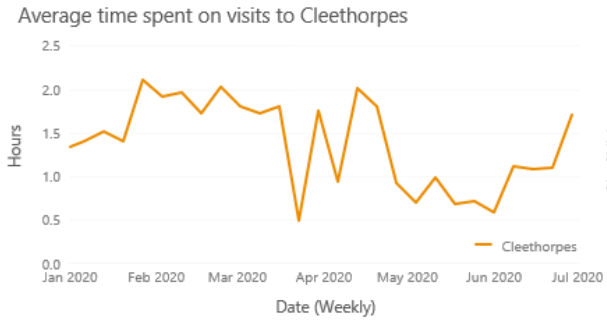


Figure 7.4c Average time spent on visits to Ashford in 2020

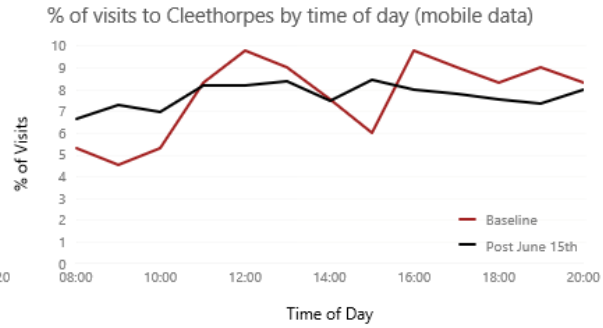


Figure 75d: Proportion of visits to Ashford by time of day in baseline period vs. post June 15th

Lockdown has affected footfall in Cleethorpes the least out of the four towns in our case studies. At its worst, footfall was down by 61% in April and it has now recovered to 14% below the baseline level.

As seen in Figure 7.4e, Cleethorpes is seeing more footfall in absolute numbers from people within 5km of the town, while travellers from longer distances are still visiting the town. There has also been an increase in the number of visits to Cleethorpes during the week.

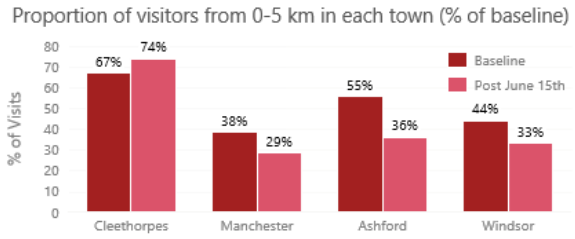


Figure 7.4e: Proportion of visitors from 0-5km in each town compared with the % of baseline activity post June 15th

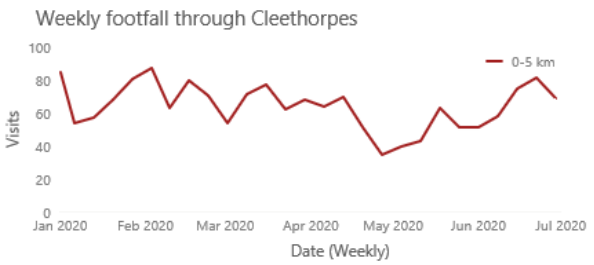


Figure 7.4f: Weekly footfall figures for visitors to Cleethorpes from within 5km in 2020

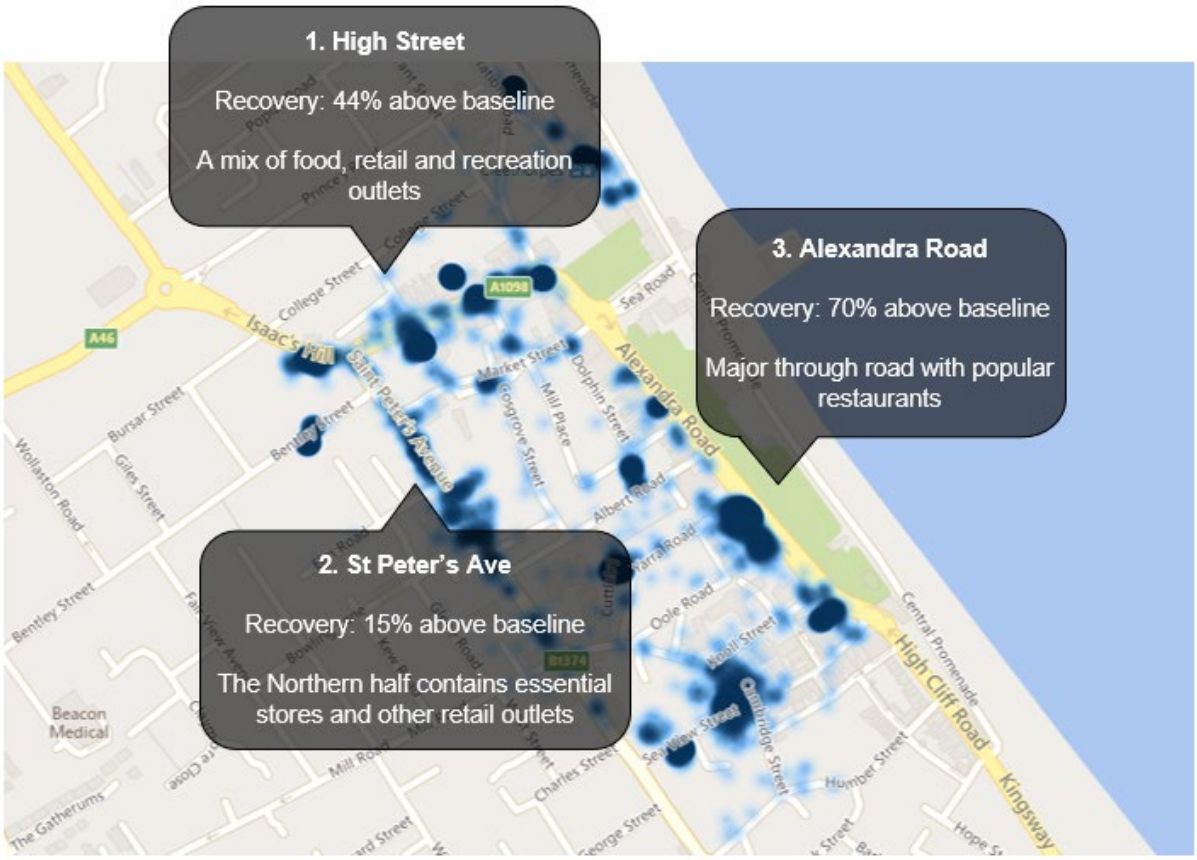


Figure 7.4g: Heat Map of activity in Cleethorpes on w/c 29/06/2020

Footfall across Cleethorpes has shown consistent patterns of behaviour pre and post-lockdown, especially since unlimited exercise was announced by the government. However, since June 15th some areas are seeing more footfall than in the baseline period, including:

1. Streets with high retail density such as High Street which saw a decline in activity during lockdown and a resurgence to 44% above the baseline in recent weeks.
2. Main outdoor shopping areas with a high number of retailers and essential stores such as St Peter's Avenue stayed busy during lockdown and have seen footfall increase to 15% above the baseline.
3. Alexandra Road, a major through road, has seen a recovery to 70% above baseline levels. This road is an access point for the beach.

Footfall has recovered well in most of the Windsor high street areas, particularly around:

1. Streets with a high retail density such as Peascod Street, a pedestrianised shopping street, which has seen a 6% increase in footfall against the baseline.
2. Major through roads such as Thames Street, which has seen a strong recovery to 75% of the baseline.

Other areas of interest include:

3. While Jubilee Arch, an indoor / covered shopping area, has a high retail density which suggests that recovery should be strong, it has only recovered to 70% of its baseline level. There are other factors that will be influencing the footfall in this area, including the reduced activity at the nearby train station, while the shopping centre is also undercover which may be influencing customer's behaviours.

7.5.1 Comparing footfall to 2019 levels in Windsor

Comparing 2020 footfall in Windsor to 2019 figures shows that footfall in the town has been down significantly, compared to 2019 levels, especially in April (Figure 7.5.1). Easter is especially important to speciality towns, like Windsor, as it marks the start of steadily increasing footfall, that peaks in August.

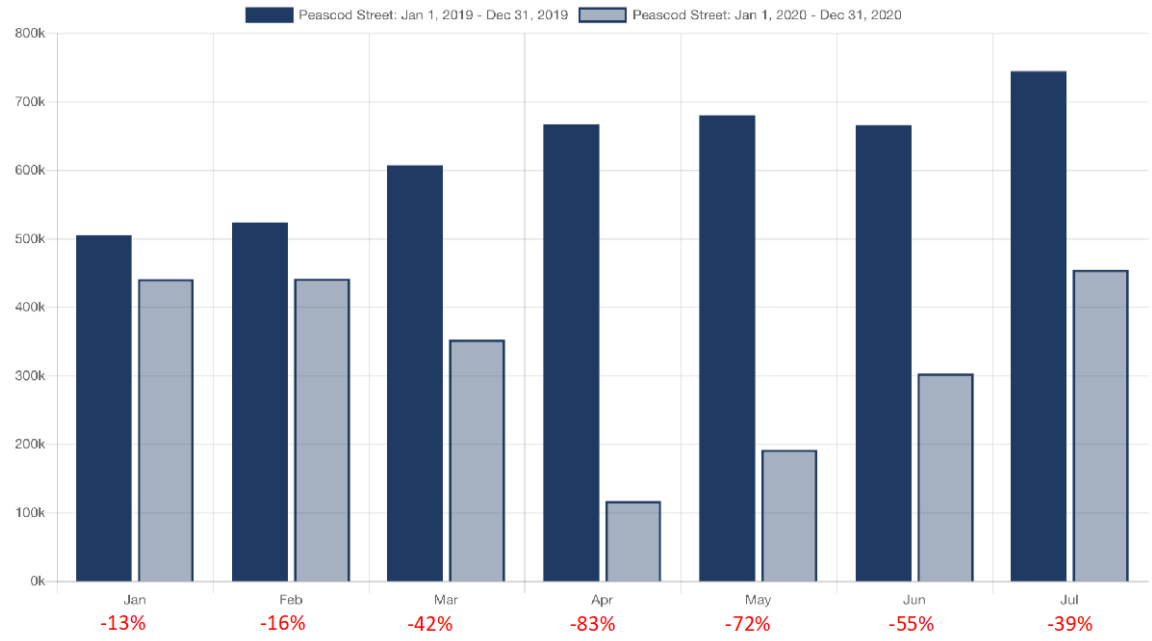


Figure 7.5.1 Comparing 2019 to 2020 footfall data for Windsor

Footfall has fallen in Windsor in line with the month-by-month comparisons we reported in Section 2 for all towns (Table 7.5.1), although from May footfall is showing slightly less of a fall, helped by domestic visitor numbers (as with Cleethorpes). However, unlike Cleethorpes, more of Windsor's attractions (like museums etc.) will have been closed for longer, making the town's recovery more challenging. Also, many businesses may have to

adapt their offer to meet national, rather than international demand – and that process may take some time.

	Mar 20 v Mar 19	Apr 20 v Apr 19	May 20 v May 19	Jun 20 v Jun 19
All towns	-40.5%	-84%	-79.3%	-66.5%
Windsor	-42%	-83%	-72%	-55%

Table 7.5.1 Comparing month by month comparisons – Windsor and all towns

8. Conclusions

Footfall 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. It is significant for evaluating the performance of high streets at a local, regional and national level. Whilst footfall can be used as a simple monitor to see trends and the impact of interventions it also reveals patterns that tell us much about the nature of high streets, how they are used, and how they are changing. Despite the importance and value of the indicator, the majority of high streets across England do not monitor footfall. This makes it almost impossible to present an accurate picture of performance at a national, regional or local level.

Nevertheless, from the sample of footfall that has been supplied to the High Streets Task Force, by Springboard, we have been able to draw a number of conclusions about the annual performance of high streets, during the first year of Task Force operations (from July 2109 to June 2020).

Even before COVID-19 struck, footfall was declining, with all the major trading periods apart from Black Friday seeing less footfall than the year previously. The decline in retail as a dominant occupier in town centres is challenging the traditional planning classification of towns. Footfall data provides a measure of activity and the report shows how this can be used to offer an alternative activity hierarchy (*major city, regional centre, town, and district*) that defines the *attractiveness* of a town. The report notes that "over a quarter of towns in our data-set may be setting visions and plans that are, perhaps, unachievable". We think that towns that currently have a sub-regional classification, but where footfall is considerably lower than would be expected, may be prone to pursue retail or commercial development in line with their 'status'. We believe that serving their local population by being a multifunctional hub is, a more achievable route to success, generating a lower but sustainable level of footfall.

Knowing a town's place in the activity hierarchy should provide the basis for the development of more effective and appropriate town centre visions, strategies and action plans because the impact of COVID-19 has been profound and has accelerated many of the trends affecting high streets. Our classification of town types based on monthly footfall patterns has demonstrated that, overall, multifunctional towns and holiday towns have fared slightly better than comparison towns and speciality towns. Both comparison and speciality towns have, traditionally, attracted footfall for their retail offer – and with non-essential retail shut for so long, this will have, no doubt, had an impact. Based on the

analysis in this report we expect smaller, multifunctional towns and districts *that serve their local catchment effectively* to be the town type that we believe will recover fastest from the impact of COVID-19. Holiday towns may well also find they see stronger recovery during the summer months. As international travel restrictions make staycations more likely, England's seaside towns may have something of a renaissance.

There is some evidence that footfall patterns, during the week and during the day, have changed as a result of the Coronavirus. From the data reviewed up to the end of June 2020, Saturday is no longer the busiest day of the week. For the many people working from home, a trip to the local high street or town centre may now be possible during the week. After non-essential retail re-opened on the 15th June, daily patterns may have changed, as footfall has extended later into the afternoon. This is probably because there are very few office workers in town and city centres, and it has been their footfall that has, traditionally, driven a lunchtime peak.

The impact of COVID-19 on England's high streets and town centres, in terms of volumes, has been profound. At the height of lockdown, on the 28th March 2019, footfall was -89.86% compared to 2019 levels. Easter, typically a key trading period for food retailers and the hospitality industry, saw footfall figures fall by -85%. It has been the bigger cities that have suffered the most, devoid of their usual employees, tourists, students and shoppers. Major cities had an average footfall of – 75.9% from 1st March to 30th June, compared to district centres, which saw footfall drop to only –34.5% of 2019 levels. These district or neighbourhood centres have been rediscovered through COVID-19. Essential retail and greenspace have been the nation's lifelines during lockdown and these humble high streets would benefit from more recognition and support through national, regional and local policy.

City centres have been in the unusual position of predominantly serving their residential catchment, like smaller towns and district centres do. The question is whether city centre residents are adequately served with everyday services. Everyone in urban environments should be able to live within walking distance of food, green space, healthcare, schools and childcare etc. With reports that some employers are questioning the need for office space, combined with the increasing trend towards online shopping, there could well be land and property that can be repurposed, in larger urban centres, to make cities more *liveable* for their resident population.

To what extent footfall returns to pre-COVID19 levels remains to be seen. The overall footfall trend is in decline (5% over a 5-year period) so even a return to 'normal' is likely to mean slightly less footfall, year-on-year. Our forecast suggests that overall footfall figures, (in other words, total footfall for England, rather than footfall associated with a particular town type), may return to pre-COVID19 levels in November 2020. However, this forecast comes with a number of caveats as it only uses data up to mid-August to generate the forecast. Therefore, it is *a highly questionable forecast* – but one the High Streets Task Force can use as a 'baseline' to assess the impact of future changes to restrictions, as they are announced by Government.

The speed of the recovery process is not only dependent on government policy and advice, however. The footfall figures from March 2020 show that many people had already made the decision to avoid their town centres and high streets *before* lockdown measures were imposed. We would expect people to continue to make their own judgements on the level of risk and appropriate mitigation strategies. So, footfall recovery will not be only influenced by the government's strategy of getting the economy moving again, but also by the individual choices and perceptions of visitors. The High Streets Task Force will continue to provide guidance to place managers and leaders to help make their local high streets and town centres safe and welcoming.

Social media analysis of Maybe* data shows that local business can play their part too – by keeping customers updated about opening hours, delivery/collection options and promotions, for example. Posts about "reopening" were found in the data as early as May, with the sentiment of all business posts in our sample generally increasing in the weeks approaching June 15th.

Thanks to the help of PwC, we have been able to augment our sample of towns with four case-study locations, integrating additional data sets, such as the Maybe* data, to provide more in-depth and local analysis. The four towns chosen (Manchester, Cleethorpes, Windsor and Ashford) represented the four town types (comparison, holiday, speciality and multifunctional, respectively).

The four towns have each seen varied results in terms of the impact of lockdown, as well as in the pace of recovery post-lockdown. Windsor, a speciality town, and Cleethorpes, a holiday town, are recovering the fastest. Ashford, a multifunctional town, and Manchester, a comparison city, are recovering the slowest. Whilst all the towns were very different, some generalisations can be drawn from the case-study locations, such as the extent to which the location relies on demand from indoor shopping centres, which, in these towns, are recovering poorly. The density of commercial land use – areas with a larger proportion of office land are not recovering as quickly. How much the high street relies on local demand (within 5km) is an important factor, with fewer people travelling longer distances. This is also related to the extent to which a location relied on overseas tourism to generate footfall. Finally, natural assets, like the seaside, are proving to be a significant attraction for some towns. The average time spent on a visit to Cleethorpes in July was one and a half hours (compared to approximately one hour in Manchester and Ashford, and half an hour in Windsor).

In conclusion, the case-studies illustrate the importance of understanding the local situation, and the value of combining datasets. Every town centre and high street needs to use local data to understand its position. For example, even though Ashford has a multifunctional footfall signature, which would suggest a faster recovery, Huq mobile data suggests the town is not so well used by its local catchment. This is likely to explain its slower recovery rate.

Whilst the case-studies and multiple datasets have certainly enriched our understanding, the final point we want to end with is to reiterate the value of footfall data. For local

authorities and place leaders that want to make evidenced-based decisions, that may, for capacity or funding reason need to choose only one dataset – *then this should be footfall*.

To support high streets that do not have automated footfall counting, the High Streets Task Force has a manual counting regime, that can provide basic data to help places monitor their recovery process and also understand how and if their function and attractiveness may be changing, as a result of COVID-19. The Task Force will also provide training and various data to place managers and leaders to augment footfall data and support the type of local analysis and decision-making that leads to better outcomes. Whilst this report has provided an overview of footfall on England's high streets, every high street is different, and every place leader needs to understand the unique position, or the 'new normal', of the high street they are trying to improve.

HIGH STREETS TASK FORCE

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