2020-21

Review of High Street Footfall in England

HIGH STREETS TASK FORCE

highstreetstaskforce.org

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

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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 its 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.

Snapshot

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

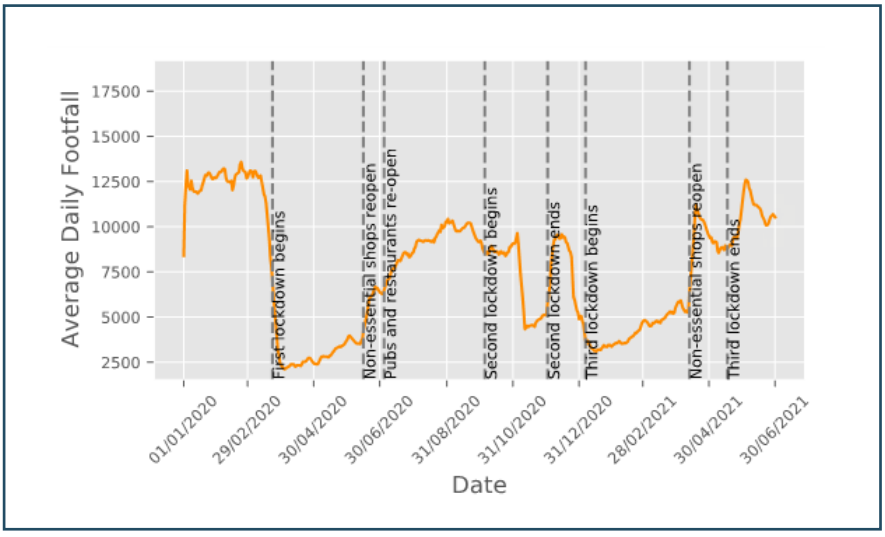
Since the imposition of the first lockdown on 23rd March 2020, England has experienced many changes to the levels of COVID restrictions, increasing or decreasing them to align with the government's latest assessment of risk to the community at large and the NHS in particular.

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.

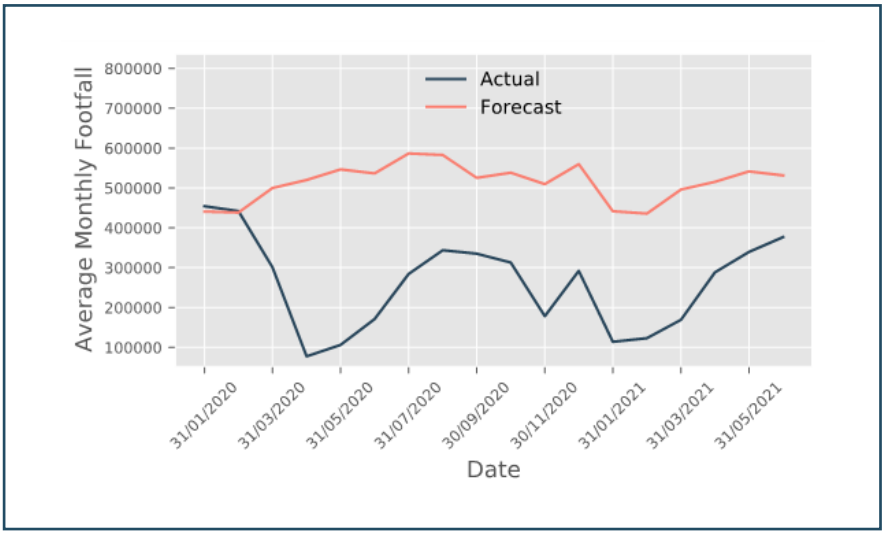
COVID-19 fundamentally changed high street footfall. The commonly applied forecasting methods based on several past years of data are no longer appropriate. Figure A shows how footfall from March 2020 to September 2021 has consistently tracked below previously forecast levels, by as much as 90% at times. 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.

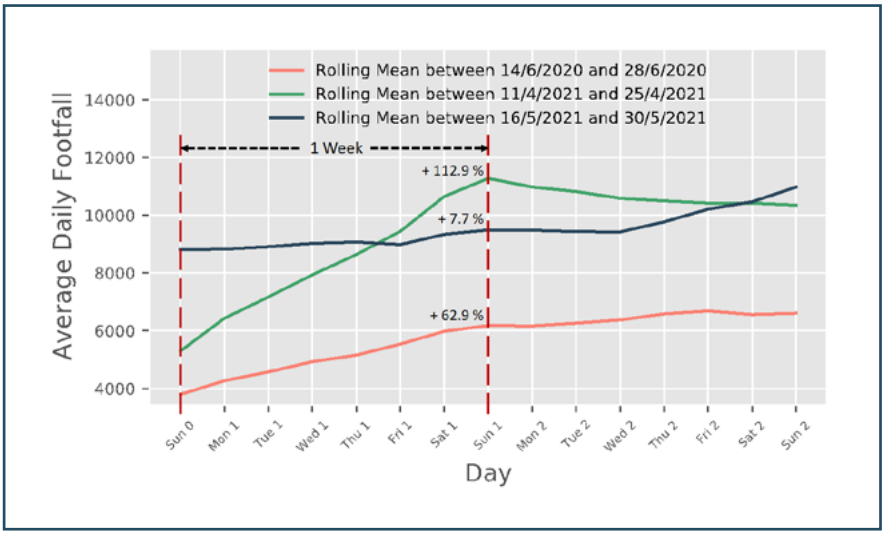
However we can observe that, with the pandemic's restrictions lifted, there was a significant bounce-back in the number of people visiting high streets.

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.

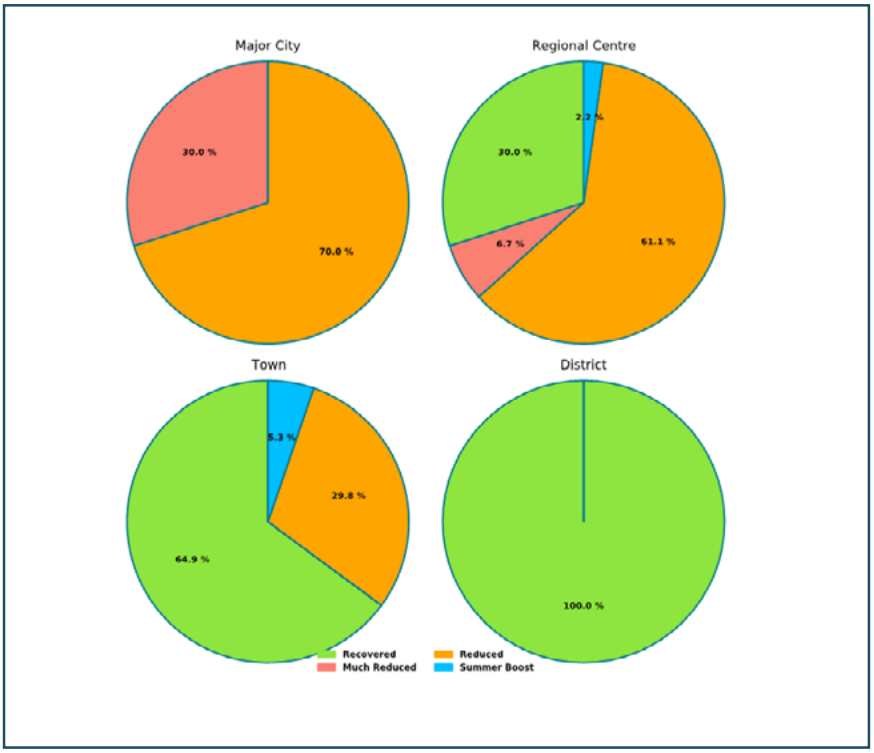


Figure v (left): How the 2020 classification of town recovery fit the town activity hierarchy

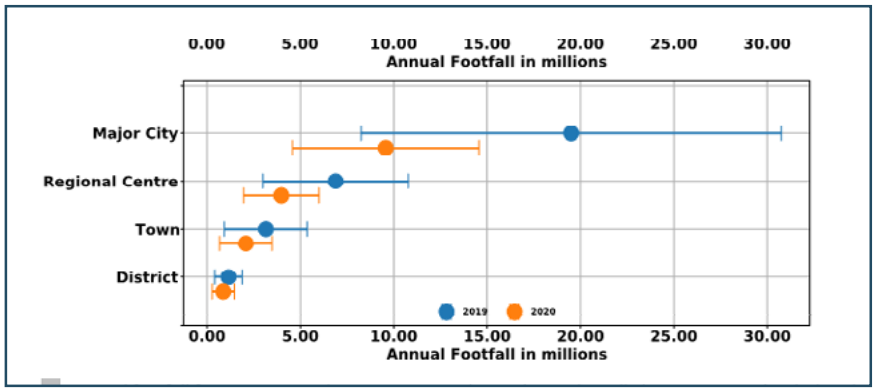


Figure vi (right): Annual footfall for UK towns and cities in 2019 and 2020 (Springboard) showing means (circles) and standard deviation ranges (error bars) for the town activity hierarchy

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 *Speciliality* 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.

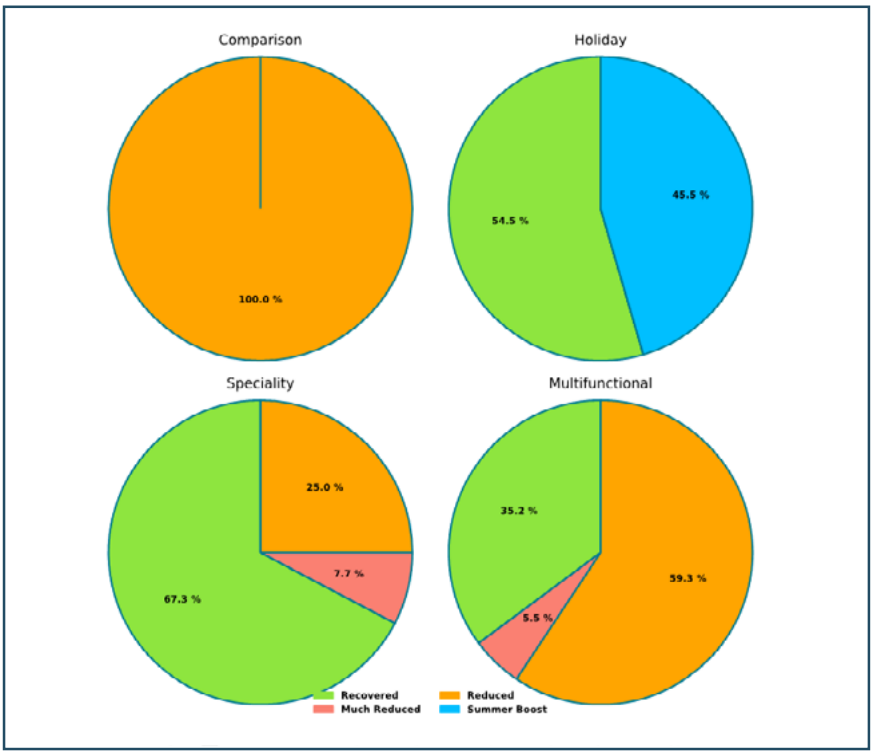


Figure vii: How the 2020 classification of town recovery fit the identified town types

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

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

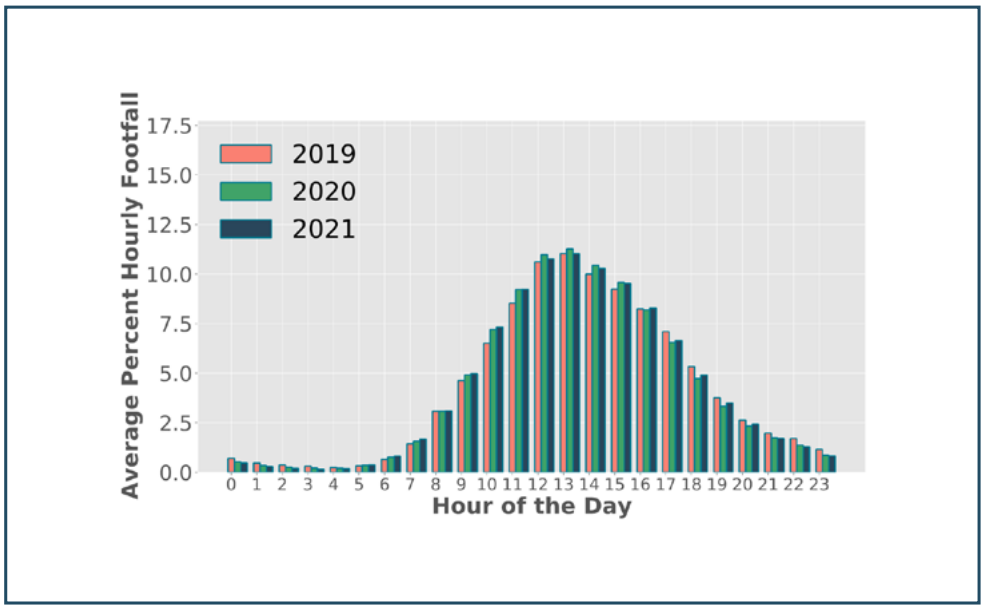
2014-2016		2017-2019			
Annual signature	**No. of towns**	**Comparison towns**	**Holiday towns**	**Speciality towns**	**Multifunctional towns**
Comparison	**32**	**12**	0	9	11
Holiday	**12**	0	**12**	1	0
Speciality	**36**	0	2	**32**	2
Multifunctional	**64**	1	0	11	**52**

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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