REVIEW OF HIGH STREET FOOTFALL

JULY 2019 - JUNE 2020
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.highstreettaskforce.org.uk

Report Authors

Cardiff University
Dr Christine Mumford, School of Computer Science and Informatics.

Manchester Metropolitan University
Dr Maria Lorono-Leturiondo, Institute of Place Management
Dr Nikos Ntounis, Institute of Place Management
Professor Cathy Parker, Institute of Place Management
Professor Simon Quin, Institute of Place Management
Dr Regine Sonderland Saga, Institute of Place Management,

PwC
Atif Jeelani, PwC
Victoria Glass, PwC
Joe Stacey, PwC

Copyright © Institute of Place Management.
All rights reserved. Apart from any fair dealing for the purposes of research, private study, criticism or review, as permitted under the Copyright, Design and Patents Act, 1988, this publication may be reproduced, stored or transmitted, in any form or by any means, only with the proper permission in writing of the authors, or in the case of reprographic reproduction, in accordance with the terms of licenses issued by the Copyright Lending Agency. Enquiries for permission to reproduce material outside those terms should be made directly to the authors. All trademarks, registered names etc. acknowledged in this publication to be the property of their respective owners. Explicit permission has been granted to the High Streets Task Force and the Ministry of Housing, Communities and Local Government to adapt and distribute this work.

ISBN :
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).

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.
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.

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.
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.

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.

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.