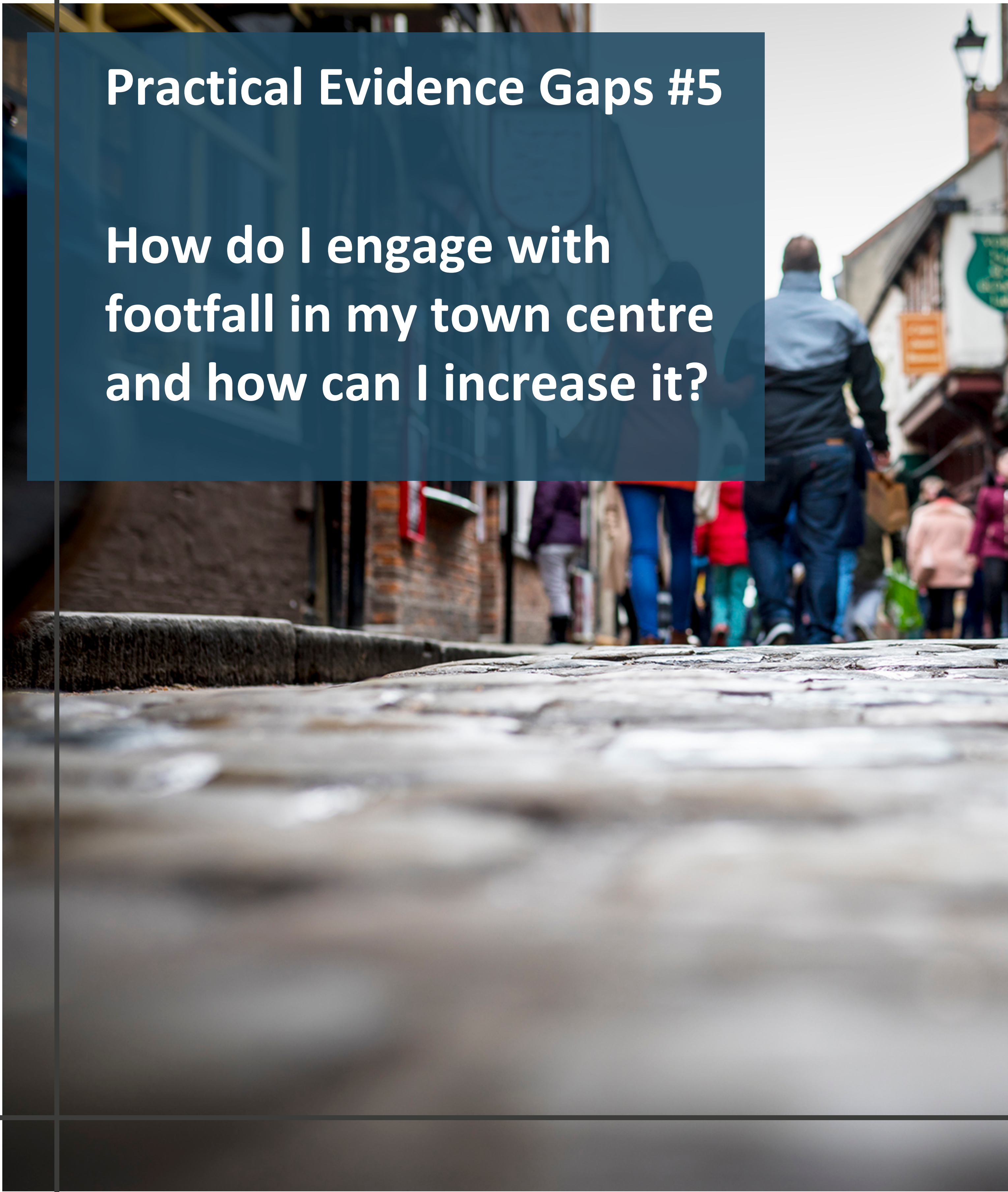
HIGH STREETS TASK FORCE

# Practical Evidence Gaps #5

## How do I engage with footfall in my town centre and how can I increase it?



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Practical Evidence Gaps are current issues affecting high streets and town centres that would benefit from more knowledge and examples. These gaps have been identified by conducting content analysis in two large sources of data:

1) the online network set up by Association of Town and City Management (ATCM) (on Basecamp), involving town and city management practitioners across the UK; and
2) the Expressions of Interest (EOI) submitted by local authorities to the Future High Streets Fund.

Ten Practical Evidence Gaps have been identified. All of them have been framed as 'how to' questions, with the aim of helping local authorities and place managers in the transformation of their high streets and town centres.

# How do I engage with footfall in my town centre and how can I increase it?

## An introduction to footfall in town centres and high streets

Footfall is a key indicator for a town centre's vitality and viability and is significant for evaluating the performance of high streets. Counting footfall can help in understanding new trends in consumer behaviour and the changing function of towns. Footfall data can be used to analyse activity patterns and as an indicator of the dominant functions of a place[1]. This can, in turn, support decision and policy making as well as engage a variety of stakeholders in sustaining their high streets.

Counting footfall becomes even more important in times of COVID-19, as it will show if and how footfall is returning to town centres and high streets, following the various lockdowns and restrictions. This, in turn, will guide the implementation of necessary interventions and measure the impact these have.

Counting footfall can be done through automatic technology (i.e. Springboard counters) or manual footfall counting can be an alternative for high streets and town centres that do not have automatic footfall counting technology. You can read more about manual footfall counting here.

## Responding to footfall changes

Since 2015, and as a consequence of changing consumer trends such as online shopping, there has been a decline in high street footfall of 5%. This trend, however, does not mean all high streets are failing, rather it signifies their function is changing.

The Covid-19 pandemic has had devastating consequences for high streets and town centres. During the first lockdown (28th March 2020), footfall fell by 89.86%. Furthermore, the pandemic has brought changes to the functionality of centres. For example, bigger towns and those focused on

[1] Mumford, C., Parker, C., Ntounis, N., & Dargan, E. (2021). Footfall signatures and volumes: Towards a classification of UK centres. Environment and Planning B: Urban Analytics and City Science, 48(6), 1495-1510.

retail (such as comparison towns) have suffered the consequences of the pandemic to a greater extent, as they rely on visitors. Smaller towns and speciality towns which serve their local community have struggled less and are showing signs of a speedier recovery.

Traditionally, many town centres matched a Saturday peak trend when looking at weekly footfall patterns. This too has disappeared somewhat during lockdowns, as people working from home had more flexibility to visit their high streets during the week[2]. In other words, the Covid-19 pandemic has accentuated the importance of centres that meet the needs of its residents, that are functional, and that have an offer that goes beyond retail, such as parks and greenspaces (during Covid-19) or culture and leisure (going forward).

Therefore, the first step to manage footfall in your town centre is to measure it, to find out when people are visiting and what parts of the town centre are more popular. Following this, initiatives can be put in place, for example, to drive footfall to quieter locations, to extend visiting hours and increase visitor numbers overall[3]. This can be done by creating temporary activities such as a market, by strengthening the night-time offer through promotions in restaurants and opening venues until later in the evening, or by creating activities in parks or squares that now have fewer traffic[4].

It is important to get inspiration from other places, but there isn't a one-size-fits-all strategy for driving footfall. The activities and initiatives need to be relevant for the demographics in your town centre and need to align with the overall strategy and vision, thus contributing to the centre image and brand. Examples set out in the Build Back Better report highlight the importance of improving the public realm, creating clean and safe spaces, and supporting businesse, as strategies to bring back footfall and improve the health of high streets[5].

Here you can find updates about how footfall is performing in the UK and footfall patterns across the four different town types (comparison, multifunctional, holiday, and speciality). This can give you an idea of your own footfall (if you don't have footfall data in your town centre), or a benchmark to compare your footfall data with.

## Examples of initiatives for managing footfall

The High Streets Task Force Footfall Report 2021, available to view here, aims to provide a better understanding of how England's high streets are recovering as a result of COVID-19. It includes a selection of case studies to illustrate how particular places are evolving and how place managers and leaders are understanding, managing and, at times, adapting to these changes.

An overview of each case study is provided below, featuring an example for each of our 2020 town types; Recovered, Summer Peak, Reduced and Much-Reduced. These are Brixton (Recovered), Newquay (Summer Peak), Manchester (Reduced) and New West End, London (Much Reduced).

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[2] HSTF. (2020).Review of High Street Footfall. July 2019 – June 2020. https://hstfprodwebsite.blob.core.windows.net/media/b5dnkp4z/hstf-footfall-report-2020-for-publication.pdf
[3] Millington, S. D., Parker, C., & Quin, S. (2018). Five ways to save Britain's struggling high streets. The Conversation.
[4] IPM. (2015) Multifunctional Centres: a sustainable role for town and city centres. https://www.highstreetstaskforce.org.uk/resources/details/?id=9f275023-d72f-488a-a61c-fc7a9b34ad4c
[5] https://www.gov.uk/government/publications/build-back-better-high-streets/build-back-better-high-streets

**Brixton (Recovered)**

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

Daytime footfall (6am to 6pm) in 2021 is 34% lower than in 2019 (for the period 1st Jan – 30th September). However, the number of people using evening and night-time attractions (6pm – 6am) is even lower – 56% lower in 2021 compared with the same period in 2019 (1st Jan to 30th September). This could also be due to a reduced number of evening and night-time attractions, as these operators have been severely impacted by the pandemic.

To gain more insight into Brixton's recovery we interviewed Gianluca Rizzo, Director of Brixton BID and of Stratford Original BID. Gianluca is a Place Management specialist with extensive experience in the BID industry. Speaking to the HSTF, Gianluca said "In order to better guide our local recovery plan (Restart Brixton) and move the local economy from a state of recovery to performance, we have recently commissioned a new piece of work founded on data. Currently, we collect movement data, spend data as well as social media sentiment data. Professional place management relies upon on informed decision making – and this includes data on all aspects related to a place."

"Data from multiple sources support our decision making but moreover, data helps us monitor the impact of our initiatives. COVID has brought the need to monitor and evaluate into sharp focus. Being able to accurately measure and adapt our plans quickly means we can support the businesses and the wider Brixton community more effectively. Our strategy focusses on positioning Brixton as a distinctive destination; attracting the right level and quality of investment and funding; promoting Brixton as an equal, inclusive and open place to do business and working in partnership to maximise opportunities."

More information about Brixton BID's Recovery Plan can be found here.

**Newquay (Summer Peak)**

Our footfall analysis identified Newquay as a Summer Peak town. Not only does footfall in 2021 follow the same pattern as 2019, but footfall volumes in June, July and August 2021 exceed those of the same period in 2019. However, the balance between the day and evening/night-time economy has not changed significantly, suggesting that the overall function of Newquay as a Holiday Town – one that is visited by tourists for overnight stays and daytrips – is still the same, but there are potential challenges associated with greater summer demand and disparity between usage.

To gain more insight into Newquay's recovery we interviewed Jennifer Dixon, a member of the Newquay Town Team, a newly formed partnership representing business, the community and local government. Jennifer is a registered architect, with extensive experience in the urban regeneration field, and is accredited as a Client Adviser by the Royal Institute of British Architects. Her response is supported by Shirley Williams who manages the data and documents for the Newquay Town Team.

Speaking to the HSTF, Jennifer said, "Newquay was very hard hit in all three lockdowns. The beaches were empty as people stayed home. The BBC News headlines of 16 June 2020 stated that Newquay was "The town facing the greatest economic hit", with the town's known shop vacancy rate rising from 8.6% to 13.9%. We gained access to Springboard footfall data in April 2021 (with a HSTF Advanced Dashboard) but consider ourselves very lucky as the footfall monthly data has been collected since July 2012 giving us a long history for use in our modelling."

"As a result of this, it has been possible to build a better understanding of the town just through regular review and consideration of the footfall information on a regular basis. In summer 2021, the Springboard data allowed us to predict the highest footfall numbers since 2014 and to prove (what we thought we saw on the ground) that the daytime footfall numbers had greatly increased although the night-time economy was decreased. This is in line with the town's strategic aim to address (and find ways to reduce) some of the more problematic aspects of the night-time economy for a better quality of life for its town centre residents."

When asked about Newquay's recovery strategy, Jennifer commented, "until the season ends and all of the numbers are in for analysis, it is impossible to fully understand how well Newquay may have recovered but our vacancy rates are nearly down to 2019 levels, and even now other larger properties in town are being occupied and we expect the rate to drop further."

**Manchester (Reduced)**

Our footfall analysis identified Manchester as a Reduced Town. Footfall in the early part of 2021 was significantly reduced, at just 79% of 2019 levels in January. In August 2021, footfall had recovered to two-thirds of footfall volumes in August 2019, but the signature for 2021 may not be following the same pattern as 2019. Footfall levels in July and August 2021 are below those of June 2021, whereas in July and August 2019, footfall was higher than in June 2021. This could be down to the fact that Manchester is popular with international tourists and ongoing travel restrictions will have impacted on footfall over the summer.

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

To gain more insight into Manchester's recovery we interviewed Vaughan Allen, Chief Executive of CityCo which manages Manchester's Business Improvement District. Vaughan is a 21$^{st}$ century city centre manager with extensive experience in events and marketing. Speaking to the HSTF, Vaughan said "With re-opening in April, we saw a surge of returnees (classic 'pent-up demand'), but this soon settled back down. For a city like Manchester, the cumulative impact of a lack of major business events, gigs and crowds at football further reduced already low numbers because of an absence of office workers, settling at around -30% footfall against 2019".

"Within that, though, there were some variations—the pure retail area on Market Street ran at higher footfall (-15% roughly against 2019) and continues to do so. Saturdays are 10% down (and some specific Sundays are out-performing 2019)—the impact of missing office and event footfall is less pronounced at the weekend. For other sensors, the lack of office footfall is more telling; but often in areas where footfall is not directly linked to spend."

When asked about the effectiveness of using footfall to predict how the pandemic has changed Manchester's economy, Vaughan said, "Footfall is a useful indicator but is not, on its own, an effective marker for economic success. While footfall can help track movement and changes in activity levels, we will want to reflect on other data (occupancy, spend, development plans, discussions with landlords and tenants) before we assume continued drops in footfall might need to lead to changes in planning and use in the city centre."

**London New West End (Much-Reduced)**

Our footfall analysis identified New West End as a Much-Reduced Town. Footfall in the early part of 2021 was severely impacted, just 89% of 2019 levels in January and 87% of 2019 levels in February. In August, footfall was still down over more than 50% of 2019 levels. Whilst overall footfall levels have dropped significantly, the balance between the daytime and evening/night-time economy has not changed. In 2019, 72% of footfall was generated between 6am to 6pm with 28% between 6pm and 6am. In 2021 (January to September) 73% of footfall was generated between 6am to 6pm with 27% between 6pm and 6am.

This suggests that the New West End may not have changed from being a Multifunctional Town – one that serves the local community and has a relatively flat footfall signature through the year - but perhaps a prolonged absence of international visitors may bring some quite fundamental changes to the area. To gain more insight into New West End's recovery, we interviewed Jace Tyrrell, Chief Executive of the New West End Company, the area's Business Improvement District.

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

"The reduction in international visitors has meant July, in particular, was quieter than in previous years. On the other hand, we have seen higher numbers of domestic visitors, especially in August and September this year. Before COVID around £10bn per annum was spent in London's New West End, with half of that being generated by international visitors. Ongoing travel restrictions have obviously severely impacted the amount of international spend in the area. National visitors spend 75% less that their international counterparts."

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

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

## 25 Vital and Viable Priorities

Research has identified 25 priorities for attractive high streets that create long-term success. This Framework can be used by place leaders to prioritise action. Managing footfall in your town centre links to some of these 25 priorities and reading about them can therefore be helpful in this task.

Managing and increasing footfall can link to the following priorities: activity, retail offer, non-retail offer, vision and strategy, experience, appearance, place management, necessities, walking, accessibility, etc. You can find more information about the 25 priorities here.

## Covid-19 Recovery Framework

This framework has been designed to assist place leaders who are responsible with the gargantuan task of supporting their cities and towns through this pandemic. The Framework sets out a series of systematic preparedness, response and recovery measures, across four stages: Crisis, Pre-Recovery, Recovery, and Transformation.

Managing and increasing footfall in town centres is included in different stages of this recovery framework. You can read more about it and download an editable version here.

## Action points for dealing with the future of culture

1. **Collect footfall data:** when and where is footfall coming back to your town centre? You can use your own footfall data or gather general UK footfall trends for guidance.
2. **Identify opportunities:** are there quiet spots in your town centre? Are there specific times of the day when footfall is low?
3. **Find initiatives and examples that work elsewhere:** what are other similar towns doing? Are there any initiatives that have been successful in other centres that you could adapt?
4. **Make a plan:** what initiatives are you going to put in place first? How do these initiatives contribute to your long-term vision? Are these initiates strengthening your centre image? Which of your centre demographic groups is the new initiative going to attract?
5. **Identify key stakeholders:** who can help you implement initiatives? Are there community groups who might want to get involved in running these initiates? Are there local talents that you can get involve to put together a creative offer?
6. **Measure success:** how many people attended a specific event? Did you see an increase in visitor numbers after the latest initiative? If you don't have automatic counting technology, manual footfall counting before and after an initiative can be a way forward.

## Acknowledgements

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