2023

Review of High Street Footfall in England

HIGH STREETS TASK FORCE

Introduction

Professor Cathy Parker MBE SFIPM

Research Lead, High Streets Task Force and
Chair, Institute of Place Management at
Manchester Metropolitan University

The High Streets Task Force Annual Footfall Review for 2023 investigates footfall trends, volumes and changes in town type classifications, compared to previous years. This is our fourth and final report in the series.

Footfall is the most important factor affecting high street vitality and viability . A successful high street attracts visitors. The collective offer encourages people to want to go there. This 'attractiveness' in the short-term (vitality) means the high street is busy and when this is sustained over a period of time (viability) then this leads to increased confidence, investment and commitment to the location. Although it is a relatively simple indicator to monitor, footfall is a very powerful indicator for decision making, as it both reflects immediate or short-term changes in how the high street is used, as well as longer term trends. That is why the High Streets Task Force encourages place leaders and place partnerships to count footfall and, in the time the Task Force has been promoting the role of footfall, the data set we use, provided by MRI OnLocation, has grown from 154 to 176 towns.

Nevertheless, despite the relative ease with which footfall can be monitored, and the powerful evidence it provides for decision making, most high streets and town centres in England (and elsewhere) still do not monitor it. Instead, from our experience, decision makers prefer to rely on a mixture of hearsay, 'best practice', other, less flexible indicators (such as land use and catchment) and anecdote. This seriously impedes the successful evolution of our high streets.

Faced with significant structural changes (such as the decline of the chain store) and the disruption that has followed a global pandemic, high streets up and down the country are changing dramatically. This is exactly the time that decision makers need data and evidence to help ensure that a new direction is set for their high streets – one that builds on their unique assets and character whilst meeting the needs of their catchment communities. This report demonstrates the valuable insight that can be gleaned from footfall by analysing data from 176 towns and cities in England, provided by MRI OnLocation.

Executive Summary

1. Footfall up 3.5% (2023 vs 2022) but still down 9% on expected levels post-COVID (since 2019)

Footfall increased in 2023 by approximately 3.5% over 2022 levels, which is positive, but as some restrictions were still in force in early 2022 it is too early to say whether it will continue to bounce back in 2024. Currently, footfall is still short of pre-pandemic levels. The overall drop in footfall between 2015 and 2019 was about 3.8%, but footfall for 2023 trails 2019 levels by roughly 12.7% over a 4-year period. Therefore, at the moment, we estimate approximately 9% of footfall has been lost from high streets as a result of COVID-19, over and above the longer-term underlying trend of falling footfall.

For those high streets with footfall data they can use simple footfall volumes to tell whether they have been impacted more or less by COVID-19 and if their strategies to evolve, post-COVID, are working (or not).

2. The patterns of peak days and months for high street visits haven't changed post-COVID (since 2019)

As mentioned above, despite a significant recovery during 2022 and 2023, footfall levels in 2023 remain at 12.7% below 2019 values. However, whilst footfall volumes may have changed the patterns of when people visit their high street have remained remarkably consistent. Footfall is still at its lowest in January and February each year, and at its highest in July and August, with a smaller peak in December. Of the days in the week, Saturday was the busiest day in both 2019 and 2023, and footfall for the other days of the week was distributed in similar proportions in both years, although weekend footfall seems to have recovered a little better than weekday.

Whilst these overall trends are interesting, all high streets have their own idiosyncrasies. Those high streets that have footfall data can ascertain when their busy (and slack) periods are. All sorts of factors can change a town's footfall patterns. Their function (see Section 4), weekly markets and other events, roadworks, redevelopment – that is why we recommend all places collect footfall data. It's imperative to understand the usage patterns of towns before decisions are made regarding what development is needed, when the place needs activating, even when is the best time to schedule cleaning and other maintenance activities.

3. Evening economy increase of 2% means footfall at 7pm now matches 9am

Observing footfall through the hours of the day, the 2023 profile is clearly a little flatter than in 2019, with activity spread slightly more evenly though the twenty-four hours. Approximately 2% of footfall has shifted into the evening/night-time (e.g. after 6pm) from the daytime (before 6pm). Whilst 2% may not seem very significant – on average this does mean there is the same amount of footfall in English towns at 7pm at night as there is at 9am in the morning. Again, these are overall trends. Without footfall data it is hard for place managers in individual locations to know when to advise businesses to open.

4. 2023 may signal the end of retail as high streets' dominant function

In previous research and reports we have identified four types of high street, based on its annual footfall profile which is indicative of its dominant function. These town types are comparison (traditional shopping centres), holiday (typically coastal towns busiest in the summer), multifunctional (a mixed bag with relatively flat annual footfall profile), and speciality (attracting tourists and shoppers). We identify these town types by using a clustering algorithm (K-means) on their historical footfall data.

This year, we also looked at the town types that emerge from just analysing two years of post-pandemic data. These reflect the usage patterns of towns now. Potentially, one of the most interesting findings of the study was the lack of evidence for a comparison town type. Whilst it is far too early to say, with any confidence, that comparison shopping is no longer the dominant function of any town, it is certainly a finding we will want to revisit with more data, in future. Nevertheless, we would expect to see changes in consumer behaviour and in the retail industry reflected in footfall signatures. This is what makes this type of data and analysis so useful, its ability to capture and reflect these changes.

1 Introduction

The High Streets Task Force (HSTF) is now in its final year. It was commissioned in 2019 by the Ministry of Housing, Communities and Local Government (now known as the Department for Levelling Up Housing and Communities, DLUHC) as a five-year programme, with an overall aim to help place leaders in England reinvent their high streets, in response to the evident decline in the vitality of our town and city centres. With the onset of the COVID-19 pandemic in early 2020, however, it soon became clear that the role of the HSTF needed to adapt quickly to help high street stakeholders cope with this extreme event.

Since the start of the pandemic, the HSTF has indeed supported hundreds of local authorities, businesses and members of the wider community, providing a national hub of data, training and expert advice, helping to deal with all the challenges impacted by lockdowns and the subsequent period of recovery. Now, in our final year, we are helping high street businesses and communities, adapt to "new normal" scenarios as they appear. An extensive evidence base is crucial to the HSTF approach. Both HSTF experts and local place leaders rely on data to pinpoint the necessity for an intervention, formulate a suitable intervention, and subsequently evaluate the success of that intervention. Quantitative data such as footfall counts and spend offer numerical trends, whilst qualitative data, such as that collected from survey questionnaires, online reviews, or posts on social media, provide valuable insights that complement the quantitative data, leading to a deeper understanding of visitor behaviour, preferences, and sentiments. Backed by years of research and experience, the Institute of Place Management, the lead partner in the HSTF, has identified footfall as the most important quantitative indicator of town centre vitality[3]. Footfall is very responsive and can be used to measure the changes on the high street almost in 'real-time'. Furthermore, there is a close relationship between footfall and other important indicators such as spend, property/rental values, and occupancy rates. Footfall can be measured by automatic footfall counters, such as those provided by MRI OnLocation (formerly Springboard)[4], the consortium partner of the HSTF responsible for providing footfall data. In addition, the HSTF has developed a manual counting programme that towns have been undertaking, some relying on volunteers to carry out the counts. It is also possible to calibrate WIFI or mobile phone data with expert help, to give an indication of levels of activity.

Although most COVID restrictions ended towards the end of 2021, the legal requirement to self-isolate did not end in England until 24th February 2022, making 2023 the first year to be completely clear of pandemic regulations. This report establishes to what extent footfall volumes and patterns have or have not changed as a result of the pandemic. Armed with nearly two decades of hourly footfall counts from all around England, and, where relevant, the wider UK we will examine, in detail, how post-pandemic activity in 2023 compares to that observed before the pandemic.

This footfall review is predominantly intended to be a reference document, to understand how England's high streets are evolving post-pandemic. It has been written for place leaders, government, and the delivery arm of the High Streets Task Force. We explain how the report might be used in the following subsection and complete this introductory section with an outline description of how we process the hourly footfall data, to extract overall trends and patterns, and identify the activity characteristics of individual towns and cities.

---

[3] https://www.highstreetstaskforce.org.uk/resources/details/?id=9e0db5fe-211f-4eea-9d5b-040605328036
[4] https://www.mrisoftware.com/uk/products/onlocation-suite/

1.1 How to use this report

This is the final annual report on footfall in England's high streets, providing part of the data provision from the High Street Task Force's Professional, Research and Data Group. This report covers the calendar year 2023 in its entirety. While previous reports were published in August 2020, and August 2021, covering July 2019 to June 2020[5] and July 2020 to June 2021[6], respectively, the final two reports cover the calendar years 2022[7] and 2023. The previously mentioned reports are suggested as supplementary reading alongside the current document. However, this review effectively encapsulates the key points from earlier studies necessary for comprehension.

The government is providing funding for the Task Force until the end of September 2024. As previously stated, the primary aim of the report is to serve as a reference tool. It aims to analyse the evolving footfall dynamics on England's high streets, categorise different town types based on footfall patterns throughout the months of the year, days of the week, and hours of the day, and importantly, offer insight as to the changing nature of high street usage, post-pandemic.

1.1.1 Local Authorities

Councils vested with planning authority can utilise this report to compare footfall trends in their towns and cities against the national trends delineated in Section 2, both pre-and post-pandemic. By correlating footfall volumes with the retail and activity hierarchies outlined in Section 3, planning authorities can better determine future designations (district, town, regional centre, major city) based on activity levels as the nation transitions beyond the pandemic. In addition, local authorities will be able to identify the town types of those settlements (comparison, holiday, multifunctional and speciality)[8]. This will help them develop strategies for recovery and reinvention that are congruent with the underlying function of the town (see Section 4). Understanding the daily and weekly footfall profile will also ensure initiatives to encourage more people to use or invest in their town are successful.

1.1.2 Town Councils, BIDs and other place partnerships

Town councils, Business Improvement Districts (BIDs), town teams, and other place partnerships can employ the report in a manner akin to local authorities. Although these entities lack statutory planning responsibilities, they may be able to glean valuable local insights necessary to assess the performance of specific areas relative 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 certain towns and neighbourhoods, there may be a lack of formal partnerships, BIDs, or other coordinating organisations such as town or parish councils overseeing the high street. In such instances, community groups and/or local business associations, such as Chambers of Commerce, can utilise the report similarly to town councils, BIDs, or other place partnerships. This enables them to enhance their understanding of the town, aid the local planning authority in designations or local plans, and share insights regarding businesses and other key stakeholders. Even in areas with existing

---

[5] https://www.highstreetstaskforce.org.uk/media/b5dnkp4z/hstf-footfall-report-2020-for-publication.pdf
[6] https://www.highstreetstaskforce.org.uk/media/opcelyp1/footfall-report-2021-final-for-publication.pdf
[7] https://squidex.mkmapps.com/api/assets/ipm/hstf-footfall-review-england-2022-final.pdf
[8] Mumford, C., Parker, C., Ntounis, N., Dargan, E. (2017), A clustering study to verify four distinct monthly footfall signatures: A classification for UK retail centres.

place partnerships, community groups and local business associations can offer valuable support by providing additional capacity and expertise in data analysis, as well as in presenting and disseminating results.

1.2 Methodology

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

1.2.1 Analysing historical footfall

The footfall data is sourced from automated counting technology, facilitated by MRI OnLocation (formerly known as Springboard). The company's counters record the number of individuals passing a specific point each hour, and we aggregate this data into yearly, monthly, daily, or hourly time series as needed. Additionally, counts from various locations, such as all town and city locations in England or the UK, are merged to create a comprehensive overview. When amalgamating footfall data from various locations and examining its progression over multiple timeframes, such as obtaining a five-year trend as demonstrated in Section 2, it is imperative to maintain consistency by ensuring that the same towns and counters are included throughout the entire dataset. Any counters introduced or removed from town and city locations within the timeframe of a particular time series must be omitted from the dataset. Consequently, there are disparities in the number of towns and locations contributing to a specific dataset, contingent upon the covered time period.

As more counters have been introduced than have been removed over the years, datasets covering more recent years are likely to encompass a greater number of locations. It is also evident that the longer the time frame, the more counters will need to be ignored. A limitation of this entire study is, of course, its reliance on footfall data solely from locations equipped with MRI OnLocation counters, totalling a maximum of approximately 200 town centres/high streets and 600 individual counter locations in England. However, this situation is dynamic, with new counters installed in different locations annually and some counters being decommissioned. Consequently, in practice, we typically work with fewer than 600 counters to ensure consistency throughout a given period of time.

2 Overall Footfall Trends in England

Please refer to our earlier reports (see Introduction) for a comprehensive overview of footfall trends during the pandemic in 2020 and 2021, and the beginnings of recovery in 2022. In the present section, our focus shifts to footfall volumes in 2023 for towns and cities in England. It is essential to contextualise our analysis by acknowledging the gradual decline in footfall observed in the years preceding the pandemic. Our study will entail aggregating data from numerous footfall counters situated across England, encompassing diverse locales from major urban centres to smaller districts. Variations between locations will not be our focus here, as that will be addressed in the subsequent section.
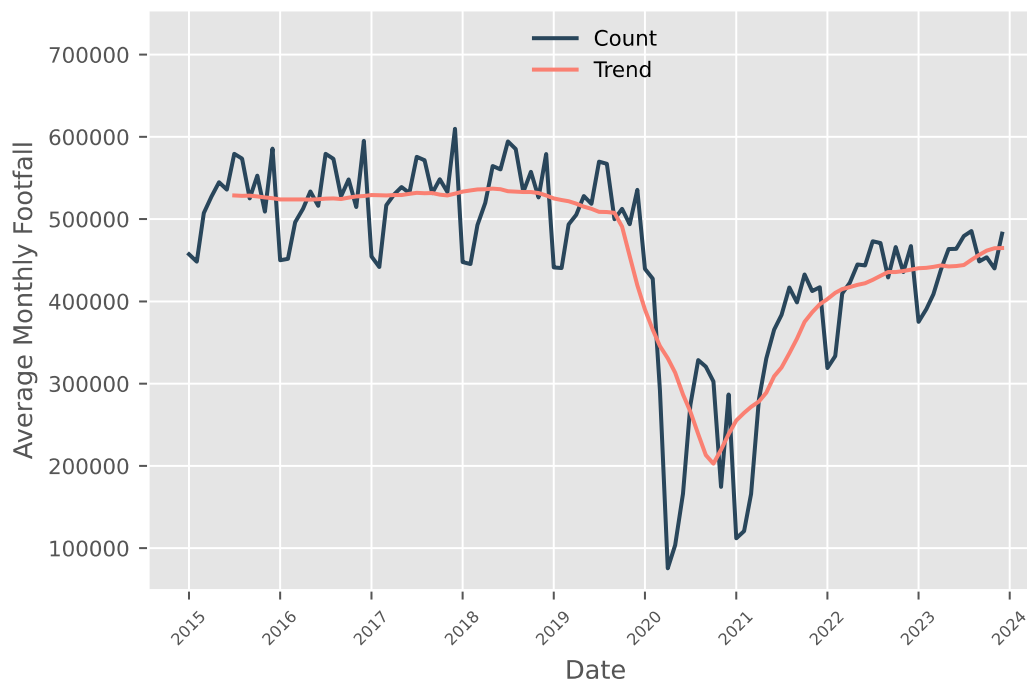

Figure 1: Overall footfall trend as a 12-monthly centred moving average.

Figure 1 shows the average monthly footfall for 211 locations in 93 English towns and cities (black) and the trend (red), computed as a 12-monthly centred moving average for five years pre-pandemic, followed by the pandemic years of 2020 and 2021, concluding with a partial recovery in 2022 and 2023. It is interesting to note the consistent footfall behaviour patterns prior to 2020 provided a good fit to various forecasting models, making it possible to predict footfall volumes for the following one or two years with reasonable accuracy. Figure 1 illustrates the scale of disruption imposed by COVID. Footfall continues to recover in 2023, with an increase of approximately 3.5% on 2022 levels. Nevertheless, it is still well short of pre-pandemic levels. The overall drop in footfall between 2015 and 2019 was about 3.8%, but footfall for 2023 trails 2019 levels by roughly 12.7% over this 4-year period. Therefore, approximately 9% of footfall has been lost from high streets as a result of COVID-19, over and above the longer-term underlying trend of falling footfall. The average annual footfall and percentage change (compared to the average footfall of 2019) for our 211 locations in 93 English towns between 2019 and 2023 is given in Table 1.

Annual Footfall					
Year	2019	2020	2021	2022	2023
Average Annual Footfall	6105933	3191949	3837540	5115403	5330401
Change in average footfall as a percentage of 2019 values	0	-47.4%	-37.2%	-16.2%	-12.7%

Table 1: Average annual footfall and percentage change between 2019 and 2023 for 93 English towns and cities.

2.1 Monthly Comparisons

Figure 2 shows a month-by-month comparison between 2019 and 2023 footfall, for a larger cohort of 426 locations in 174 English towns and cities. The increase in locations is possible because for the previous plot (Figure 1) we could use only those locations that had been counted for the entire period of nine years between 2015 and 2023, but for Figure 2 the period was shorter (only five years) allowing the inclusion of more locations. As has already been established, footfall has not regained its 2019 volume. Figure 2 does not suggest any major shift in consumer behaviour since 2019. Interestingly, the decline in footfall for the entire year of 2023 compared to 2019 obtained from the 426 locations was only 12.2%, which is slightly lower than the 12.7% drop computed from the 211 locations used for the nine-year moving-average exercise in the previous subsection.
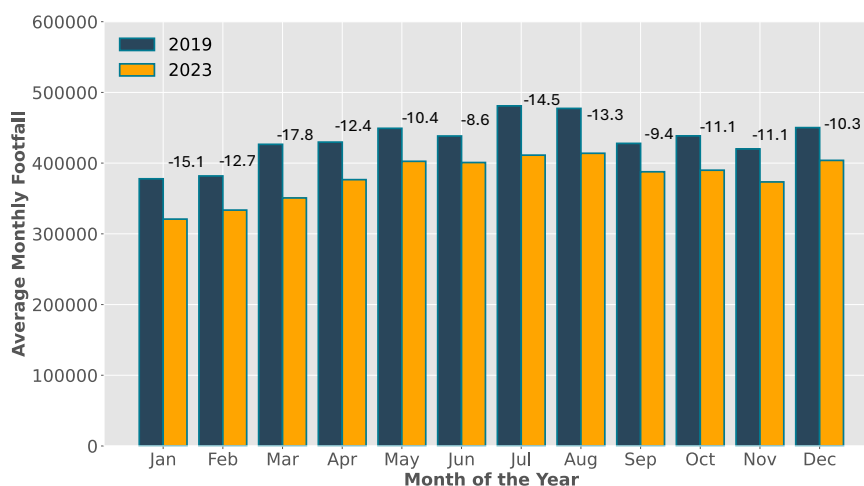

Figure 2: Month-on-month comparisons between 2019 and 2023 for 426 locations in 174 English towns and cities.

2.2 Daily Comparisons

In Figure 3 we can observe comparisons between average daily footfall volumes in 2019 and 2023 for the same 426 locations in 174 English towns and cities. Once again, volumes are down but Figure 3 does not indicate any major changes in consumer habits regarding which days of the week they visit their town or high street. Saturday remains the most popular day.

2.3 Daytime and Night-Time Economies

Figure 4 illustrates the spread of footfall throughout the hours of the day, for our 174 English towns and cities. Once again, no dramatic changes in visitor behaviour can be observed, although it seems that the daytime economy has suffered slightly more than the night-time economy. If we define the daytime economy between 6am and 6pm, the percentage of visitors in the daytime is 81.5% and 79.6% in 2019 and 2023 respectively.

An alternative method of dividing the hours of the day employed by MRI On Location (Formerly Springboard) is given below:
- Daytime, 9am – 5pm
- Early Evening, 5pm – 8pm, and
- Night-time, 8pm – 9am

Daytime corresponds with the standard working day, the early evening would cover largely dining out, and night-time would largely be accounted for by activity in pubs and clubs. Figure 5 shows the percentage of footfall occurring at the three different periods defined above, for 2019, 2022, and 2023. The charts indicate a gradual percentage-wise improvement of the early evening economy.
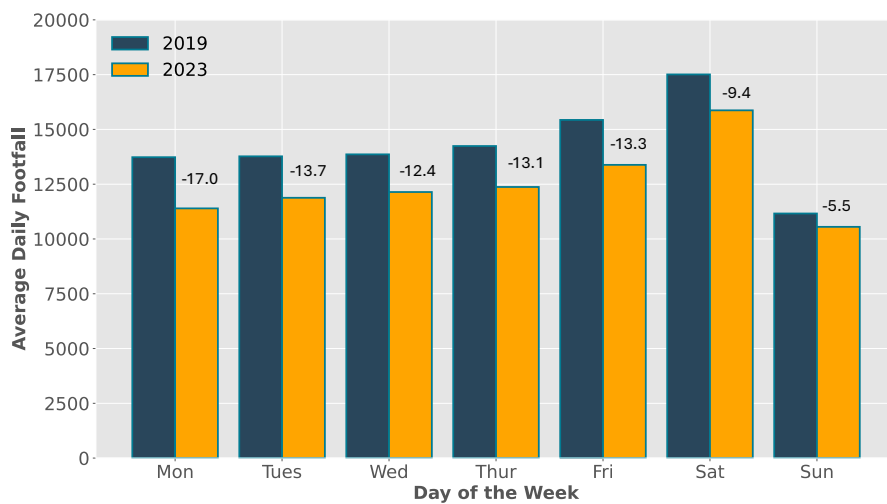

Figure 3: Comparison between 2019 and 2023 average footfall volumes for the days of the week for 426 locations in174 English towns and cities.
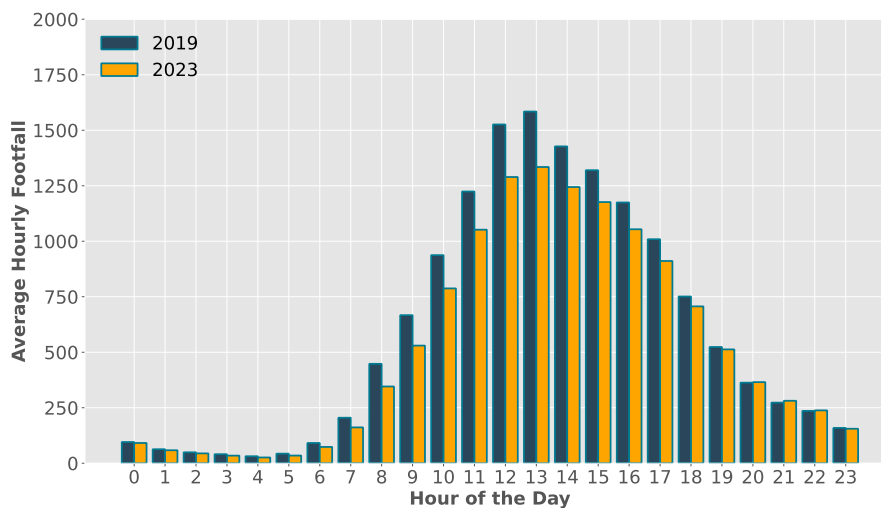

Figure 4: Comparison between 2019 and 2023 average hourly footfall volume for the twenty-four hours of the day.
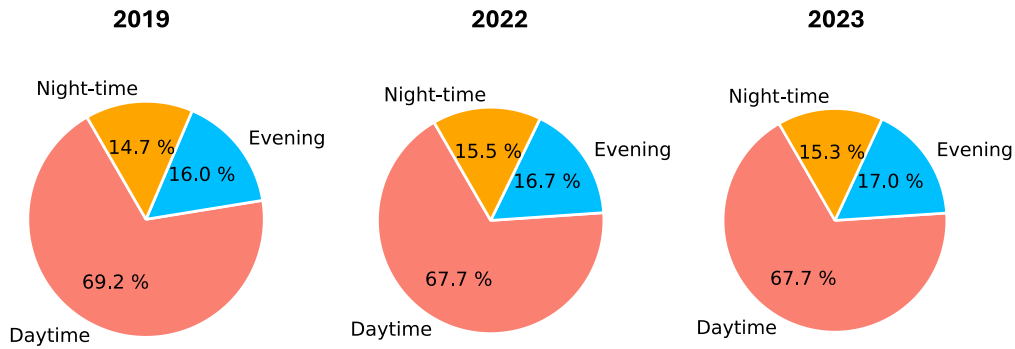
2019　　　　　**2022**　　　　　**2023**

Figure 5: Daytime, early evening and night-time economies in England for 2019, 2022 and 2023.

2.4 Seasonal Trends and Key Trading Periods

In this section we examine key trading periods, comparing 2023 with 2019 for the following: summer holidays, Easter, and Christmas trading, including Black Friday and the post-Christmas period (from Boxing Day to New Year's Eve).

2.4.1 Summer Holidays

August is a key summer month for seaside towns and other places that rely on tourism, with schools on holiday and many adults taking annual leave from work. Figure 6 compares the average daily footfall for August in England with the same period in 2019, aligning the days of the week by shifting the 2019 footfall data to incorporate two days at the end of July. The same data was used for this experiment as we used for the previous 2019/2023 comparisons, consisting of 426 locations in 174 English towns and cities. August 2023 showed a decrease of 12.4%, which shows an improvement over the 2022 comparison with 2019, recorded as a 14.4% drop[9].
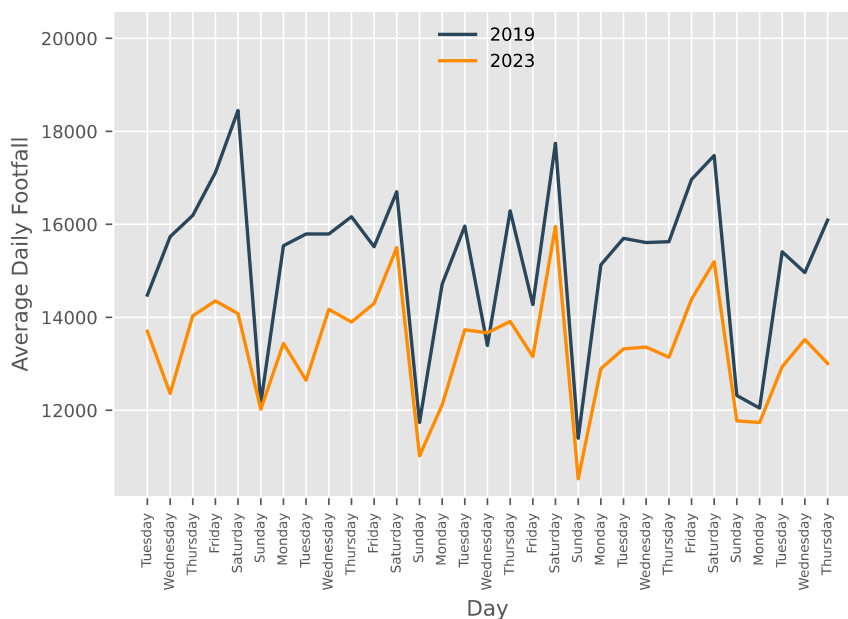

Figure 6: Comparing 2019 and 2023 average daily footfall volumes during August for 426 locations in 174 English towns and cities.

---

[9] https://squidex.mkmapps.com/api/assets/ipm/hstf-footfall-review-england-2022-final.pdf

2.4.2 Easter

Figure 7 compares Easter 2023 with 2019 for the same 174 English towns and cities as before. Overall, footfall over Easter 2023 has a decline of 14% compared to 2019 volumes.
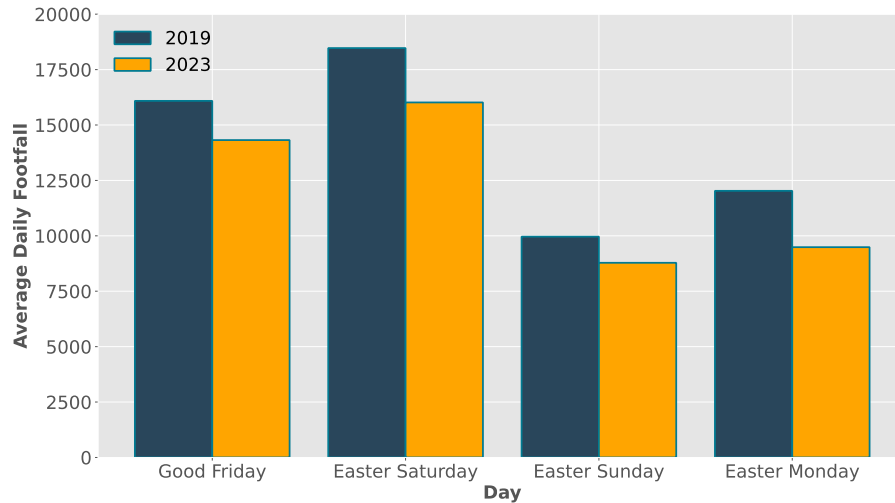
Figure 7: Comparing 2019 and 2023 average daily footfall for Easter, using the same 174 centres as before

2.4.3 Christmas Trading

In order to examine Christmas trading in its entirety, we examine comparisons between 2023 and 2019 footfall in the four weeks preceding Christmas, Black Friday and the post-Christmas sales.

2.4.3.1   The four weeks before Christmas

Figure 8 shows the comparisons for the four weeks before Christmas. The overall drop between 2019 and 2023 was 12.2%. This is somewhat better than the result of 15.3% drop we recorded for the same weeks in 2022.

Figure 8: Comparing 2019 and 2023 average weekly total footfall for the four weeks before Christmas, for 174 English towns and cities.

2.4.3.2   Black Friday

Black Friday in 2019 and 2023 fell on 29th and 24th of November, respectively. Figure 9 shows the footfall volumes for those two years, presenting Black Friday, the Friday before, and the Friday after for the 174 English towns and cities used previously. The drop for Black Friday in 2023 was 17.4%, compared to 2019 volumes, which is higher than the 15.4% we recorded when comparing 2022 with 2019. This could be explained by considering that Black Friday in 2022 fell 5 days closer to Christmas than in 2023. As such, more people were likely to be focussed on buying Christmas presents on Black Friday 2022 than in 2023.
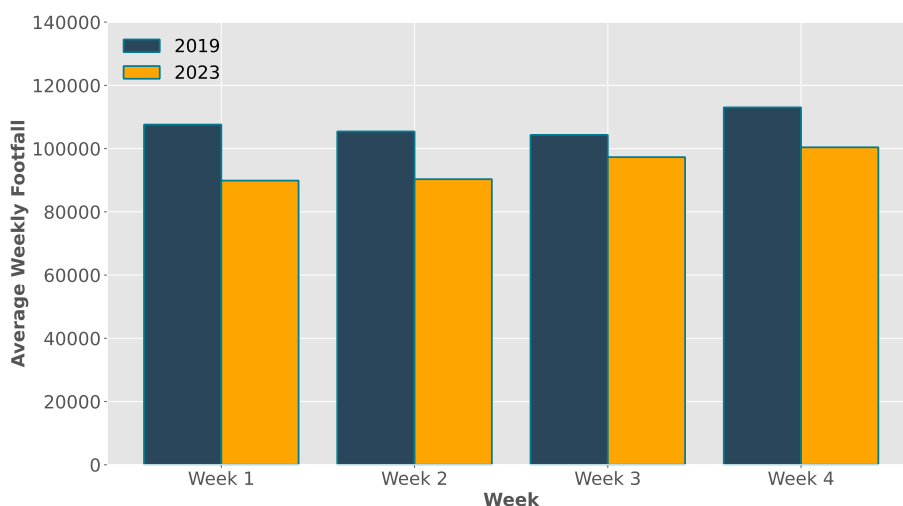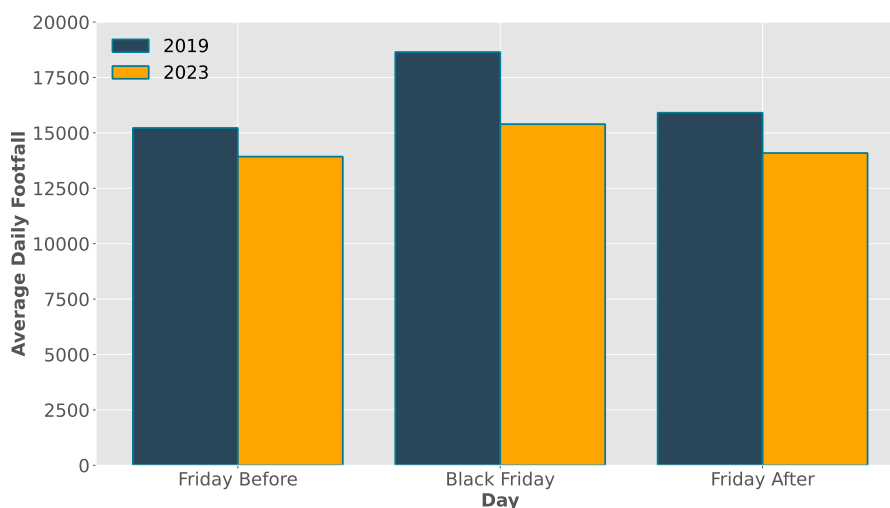

Figure 9: Comparing 2019 and 2023 average daily footfall volumes over Black Friday, the Friday before and the Friday after for 426 English locations.

2.4.3.3   Post-Christmas sales

Finally, the post-Christmas sales period between 26th – 31st December is examined in Figure 10, comparing 2023 with 2019 by date. Overall, the period recorded a drop in footfall volume of 13.9%, which is better than the figure for 2022 which was 16.3%. Two of the dates in 2023 recorded higher volumes: 26th and 29th December. The surplus in 2023 can probably be explained because the 29th fell on a Sunday in 2019 instead of a Friday in 2023. The days of the week for the 26th of December were Thursday and Tuesday, respectively, for 2019 and 2023.
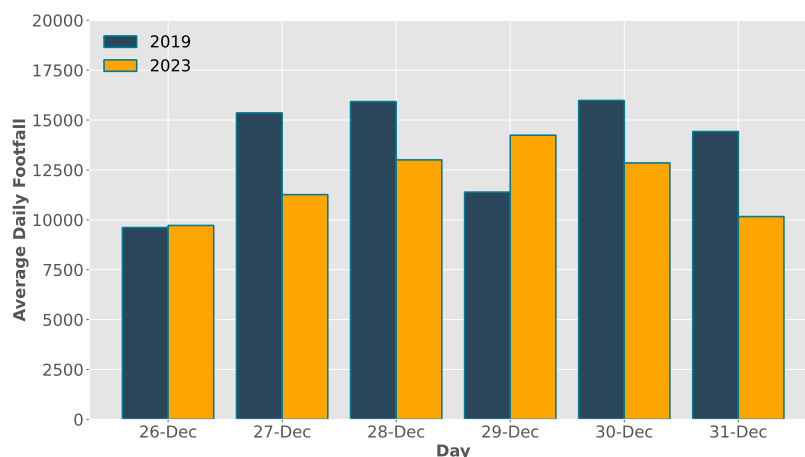

Figure 10: Comparing 2019 and 2023 average daily footfall volumes for the immediate post-Christmas period, for our cohort of 426 locations in 174 English towns and cities.

2.5 Section Summary

Before the COVID pandemic, high street footfall had experienced a gradual but consistent decrease over more than ten years. Despite this decline, the footfall volumes exhibited regular and predictable patterns every month up to 2020, enabling reasonably accurate predictions for the following year. However, the advent of COVID disrupted these patterns entirely, leaving us awaiting the establishment of new footfall norms before we can resume forecasting efforts to evaluate the long-term trajectory of the high street. This section focused on analysing overall totals and averages across England, without differentiation based on individual place sizes or natures. The examination of variations among different places is addressed in Sections 3 and 4.

The first part of Section 2 looked at footfall trends for England as a whole over the last nine years, illustrating the slow decline before the pandemic, and the catastrophic impact of COVID during 2020 and 2021. Despite a significant recovery during 2022 and 2023, footfall levels in 2023 remain at 12.7% below 2019 values.

Next, we looked at footfall volumes for the months of the year, days of the week and hours of the day, comparing the patterns of 2023 with those of 2019. It is interesting to note the consistent way that footfall is distributed between the months of the year, the days of the week and (to a lesser extent) the hours of the day, when comparing 2019 and 2023. For example, footfall was at its lowest in January and February each year, and at its highest in July and August, with a smaller peak in December. Of the days in the week, Saturday was the busiest day in both 2019 and 2023, and footfall for the other days of the week was distributed in similar proportions in both years, although weekend footfall seems to have recovered a little better than weekday. Observing footfall through the hours of the day, the 2023 profile is clearly a little flatter than in 2019, with activity spread slightly more evenly though the twenty-four hours. Clearly though, in all cases, the volumes for 2023 reflected the 12.7% overall drop in volumes mentioned above.

Finally in this section, seasonal trends and key trading periods were examined, once again comparing 2023 with 2019. Our findings revealed that in every case 2023 volumes were lower than 2019; on August by 12.4% , over Easter by 14%, during pre-Christmas trading by 12.2%, on Black Friday by 17.4%, and during the post-Christmas sales by 13.9%. The large decline in footfall on Black Friday is likely to be because Black Friday was 5 days closer to Christmas in 2019 than in 2023. On the whole, the comparisons between 2023 and 2019 for key trading dates are in line with the figures for the whole year, of a 12–13% drop in footfall between 2019 and 2023.

3 Footfall Volumes and the Retail Hierarchy

The previous section covered footfall volumes and patterns over England as a whole, comparing 2023 with previous years, but focusing mainly on recovery since the pandemic. In the present section, we will be uncovering the variation in annual footfall volume between places, examining its relationship with "town size". We collected footfall from hundreds of locations throughout the country, and accumulated it, examining annual, weekly and daily patterns for an "average" English location. For this work, we will use data from the whole of the UK, as we are examining activity over the retail hierarchy, which extends throughout the UK and provides us with more data to increase the reliability of our results.

Local planning authorities designate their town and city centres using a retail hierarchy consisting of major city, regional centre, sub-regional centre, major town, town, and district. Recent research, however, shows some large overlaps when it comes to footfall volumes across neighbouring classifications (for example, between regional and sub-regional centres), suggesting that this may not be the most suitable classification when dealing with place attractiveness and planning decisions[10]. A simplified (reduced) hierarchy based on footfall levels, might be more useful for planners and decision-makers, especially as retail appears to be losing its attractiveness. In the present report, we have adopted the reduced hierarchy suggested in Mumford et al. (2021), which classifies centres into major city, regional centre, town, and district by effectively merging regional centres with sub-regional centres and major towns with towns, to form the combined designations of regional centre and town, respectively[11]. The first part of this section is devoted to the study of how footfall varies according to the level in the retail and activity hierarchies, while the second part explores this further by classifying towns according to their annual footfall volumes, forming an activity hierarchy, based on the centre's footfall activity, rather than its size as indicated by its planning designation.

3.1 Retail hierarchy, Reduced Retail Hierarchy and footfall

Annual footfall volumes are recorded from the busiest footfall counter in each UK town or city served with MRI OnLocation counters. Figure 11 shows the annual footfall volumes and error bars (standard deviations) for 202 places classified in the different levels of the retail hierarchy (top) and reduced hierarchy (bottom). Consistency is important here, so we only include places with the same counter installed and operational between January 2019 and December 2023 in our studies. From Figure 11 we can see that footfall volumes in major cities tend to be much higher than at any other level in both the retail hierarchy diagrams, although major cities also show the greatest variation. The large overlaps between categories in the planning hierarchy (top) have been noted before and led to our recommendations to reduce the number of categories to four[12]. Nevertheless, substantial overlaps remain (bottom). Overall, footfall levels for 2023 are lower than pre-pandemic levels at all levels of the hierarchy, although they show a slight improvement over 2022. The percentage change in footfall volumes between 2019 and 2023 (indicated in the figures next to the error bars) indicates that regional centres, subregional centres, major towns and towns seem to have encountered the greatest hit, with

---

[10] 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. https://doi.org/10.1177/2399808320911412
[11] See above.
[12] See above.

major cities and districts faring rather better, suggesting that convenience needs are still serviced by district centres and that the pull of major cities for shopping and entertainment remains relatively strong.
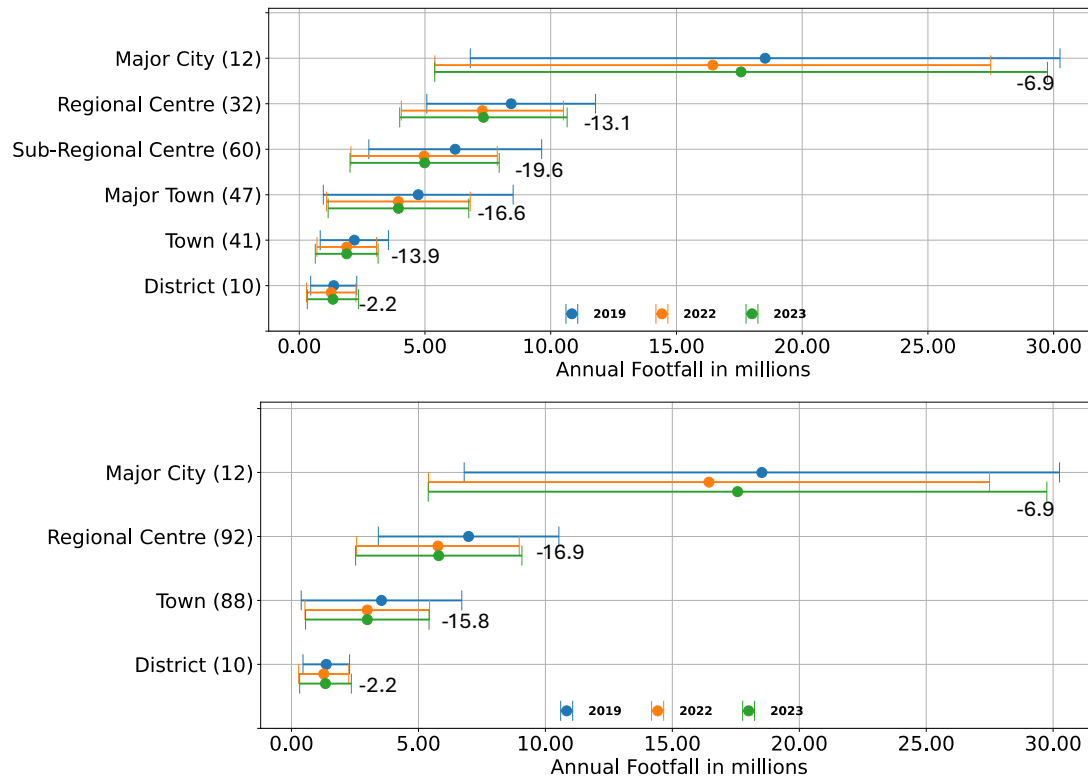

Figure 11: Annual footfall in 2019, 2022, and 2023 for 202 UK towns and cities (MRI On Location) showing means (circles) and standard deviation ranges (error bars) for the UK Planning Hierarchy (top) and our Simplified Retail Hierarchy (bottom). The number of places in each category is shown in brackets on the y-axis, while the percentage change between 2019 and 2023 is indicated in the graph for each category.

3.2 The Activity Hierarchy

Instead of relying on data from planning officers to determine the position of a place in the retail hierarchy, we will now explore a method for dividing towns and cities into different categories based on footfall, i.e., on how busy they are. In this way, we will construct an activity hierarchy with four classes, and compare it with our reduced retail hierarchy, also consisting of four classes. The towns and cities are divided into classes using a one-dimensional clustering technique called Jenks Natural Breaks[13]. The method seeks to minimise the variance *within* classes whilst maximising it *between* classes. Having discovered that a few very large values in the major city category (for example, in London) severely distort the results, we applied Tukey's method as a well-established technique to exclude outliers, prior to applying Jenks method[14]. Figure 12 illustrates the classes obtained by applying Jenks method to the 202 UK towns' footfall volumes for 2023. It should be noted that three outliers were detected having footfall volumes in excess of 28,000000, but these are not included in the diagram.

Table 2 shows the distribution of footfall in the Jenks classes and how this is related to the simplified retail hierarchy. Districts mostly fall into Jenks class 1, towns into classes 1 and 2, regional centres into classes 2 and 3, and major cities into classes 3, 4 and 5. Broadly speaking, the Jenks classes reflect our simplified or reduced hierarchy, with some inevitable overlap. This subsection represents a brief

---

[13] Jenks, G.F. (1967). The data model concept in statistical mapping. International Yearbook of Cartography 7, 186–190.
[14] See above.

sample of some current research being undertaken by our research group into new and simpler ways of classifying towns and cities.
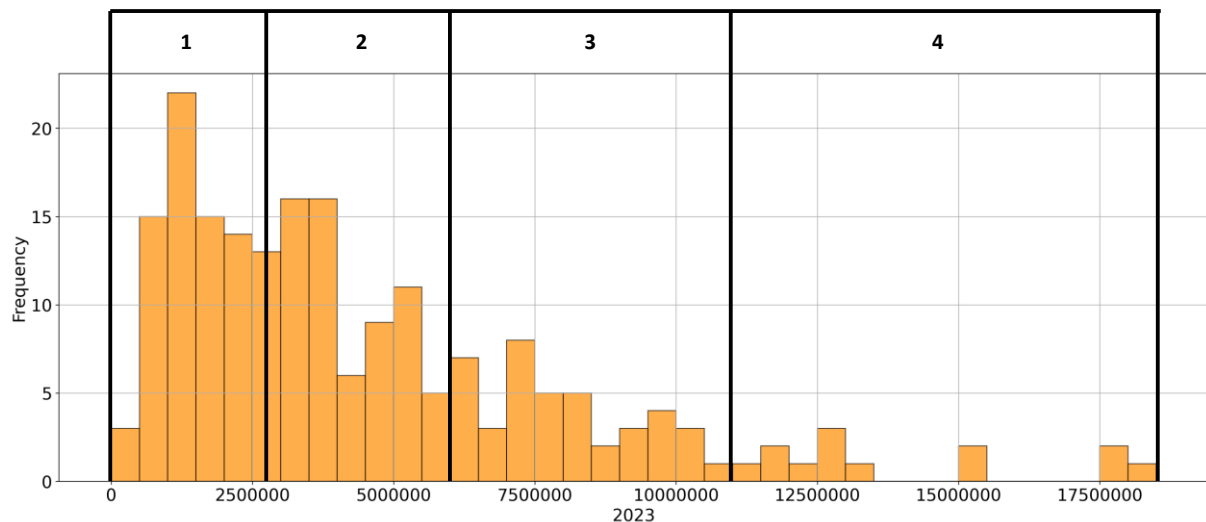
Figure 12: Histogram of annual footfall volumes in 202 UK towns and cities. The histogram is divided into four classes using Jenks Natural Breaks.

Reduced Hierarchy	Jenks Class				Total
	1	2	3	4	
District	9	1	0	0	10
Town	53	26	7	2	88
Regional Centre	13	43	29	7	92
Major City	1	0	4	7	12
Total	76	70	40	16	202

Table 2: Distribution of towns and cities in their Jenks classes for annual footfall in 2023, showing the membership of the reduced retail hierarchy categories in each class. The three outliers are included in class 4, for completion, as they all have very large footfall volumes.

3.3 Section Summary

In this section, we looked at how footfall volumes vary between places of different sizes, extending our consideration to the whole of the UK. We initially categorised the towns and cities based on their positions in the retail hierarchy devised for UK planning, which splits towns and cities into six categories: Major City, Regional Centre, Sub-Regional Centre, Major Town, Town and District. We then visualised the footfall levels for each category using error bars, noting the large overlaps between the categories (Figure 11 top). Of particular note, is the enormous range of footfall volumes observed for major cities, in comparison with the ranges for other classes. A clearer picture emerges if we combine some of the classes to form what we have called a reduced retail hierarchy: Major City, Regional Centre, Town and District (Figure 11 bottom). Comparing 2023 with 2019 in both diagrams in Figure 11, we noted districts showing the greatest resilience, with footfall declining only by 2.2%, followed by major cities at 6.9%. The categories in between districts and major cities fared much worse, dropping between 13 and 20%. Finally, this section introduced a methodology that subdivides towns and cities into size categories based on how busy they are (i.e., activity hierarchy), using Jenks Natural Breaks to determine where the dividing line should be between the classes. This is part of some ongoing research being undertaken jointly by Cardiff University and IPM.

4 Classifying High Streets by their Activity Patterns

The previous two sections covered footfall volumes, focusing on overall footfall trends for the whole of England in Section 2, and on variations between footfall volumes for towns and cities of different sizes in Section 3. Section 3 also explored how towns and cities of different sizes appear to have been differently impacted by COVID-19. In the present section, we are more concerned with footfall patterns, rather than volumes – how high street activity varies according to the month of the year, day of the week or hour of the day. We begin by examining annual patterns, analysing how the distribution of footfall through the months of the year, depends on place, using a clustering algorithm to establish a classification. Following this, variations in weekly patterns (according to the day of the week), and daily patterns (according to the hour of the day) are analysed in a similar fashion. Each place has its own unique set of footfall patterns or *signatures* which are obtained by averaging footfall volumes over the months of the year, the days of the week, and the hours of the day for a period of time and expressing them as percentages. The signatures help us discover how towns are used by their residents and visitors. The annual, weekly, and daily footfall signatures are discussed in separate subsections, beginning with a brief description of the methodology. We refer the reader to our previous reports that cover 2020, 2021 (periods most impacted by COVID), and 2022 (the aftermath of the pandemic).

In this section, we make extensive use of clustering methodology, employing a statistical technique known as *K*-Means. *K*-Means belongs to a class of unsupervised machine learning methods and works by attempting to group similar items together. Once the method has been supplied with the number of classes required, *n*, it embarks on a methodical "trial and error" process attempting to partition the dataset into *n* classes in such a way that minimizes the in-cluster variation, swapping data items between classes to try to improve the classification[15]. The process ceases after a given number of iterations (trials) usually determined after no improvements to the classification have been identified for some time. Once complete, each of the *n* classes is characterised by a *centroid* which is an imaginary pattern which sits at the centre of each cluster and acts as a representative of that class.

In the present context, we apply *K*-Means to footfall patterns for UK towns and cities and identify centroids for months of the year (annual), days of the week (weekly), and hours of the day (daily). We have discovered that the differences between high streets are best distinguished by allocating four classes to the annual study, and two each to the weekly and daily processes.

4.1 Annual Signatures

Over the course of several years, we have observed distinct patterns in foot traffic corresponding to different months of the year. Mumford *et al*. (2021) conducted a *K*-Means clustering analysis using a decade's worth of footfall data from Springboard (now MRI OnLocation), spanning up to 2016 and encompassing 125 retail centres across the UK[16]. This analysis revealed four distinct 'footfall centroids', each representing the centre of a cluster identified in our study. Each town and city in our research were classified based on the centroid that most closely matched its annual footfall signature. These

---

[15] Ward, H. (1963) 'Hierarchical grouping to optimize an objective function'. *Journal of the American Statistical Association*, 58(301) pp. 236–244.

[16] 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. https://doi.org/10.1177/2399808320911412

clusters were named to reflect their characteristics: comparison, holiday, multifunctional, and speciality (refer to Figure 13). To conduct this analysis, we calculated the mean monthly footfall for each town or city individually. While many centres have multiple counter locations, we averaged the footfall data across all counters within a specific town or city, considering complete years of data and excluding counters operational for less than two years. Figure 13 outlines the key features of each of the four types of towns identified in our analysis.
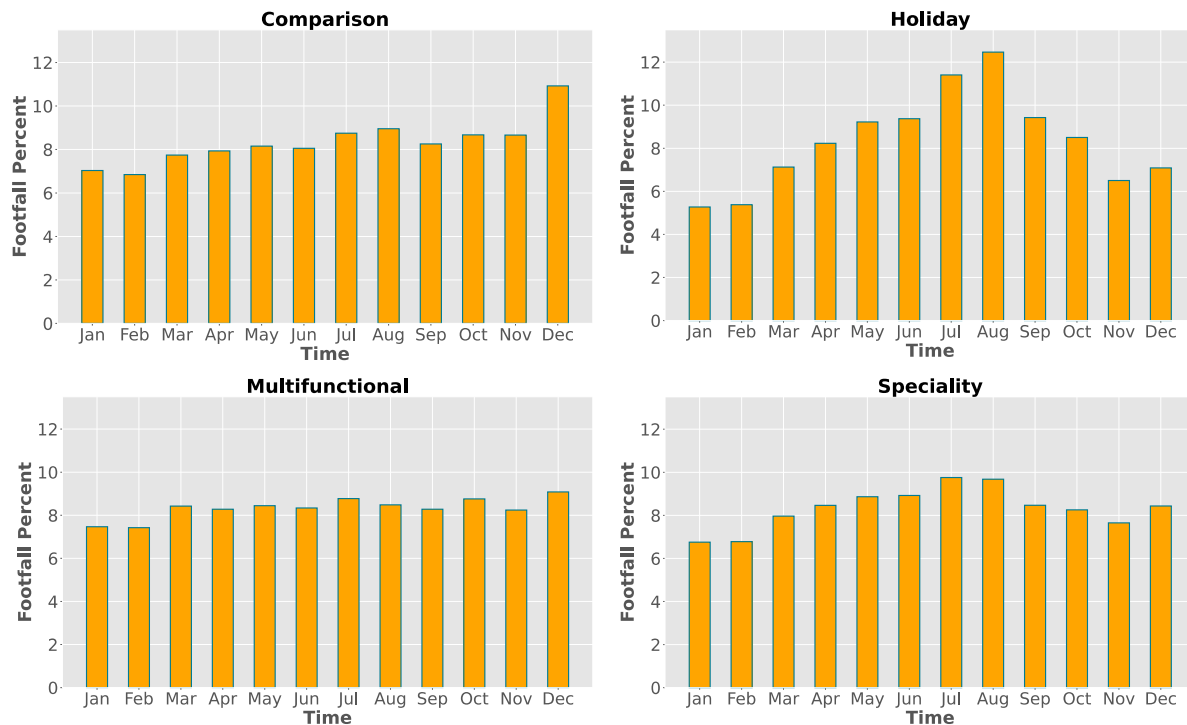
Figure 13: Our annual benchmarks, consisting of centroids obtained from the footfall of 125 town and city centres collected over ten years.

Comparison Towns

Comparison towns represent the traditional shopping hubs, found within the larger town and city centres which also serve as significant employment and educational hubs. These areas typically exhibit a notable surge in foot traffic during December, aligning with the festive season and preparations for Christmas. A smaller peak in visitors is also noted in July and August, coinciding with the warmer weather and school holidays. People are willing to travel longer distances to visit comparison towns, as they boast a diverse array of retail options, along with abundant leisure offer, dining, and beverage establishments. They also feature prominent retail anchors and a notable presence of both national chains and international brands, exemplified by locations like Manchester.

Holiday Towns

Holiday towns primarily attract tourists seeking either a vacation destination or a day excursion. Their primary focus lies in offering entertainment and leisure options rather than catering primarily the local population. These towns experience their peak activity during the summer months and favourable weather conditions. Visitors often travel significant distances to explore these locales. While appealing to tourists, holiday towns typically lack the robust comparison-shopping opportunities found in other areas, exemplified by destinations like Bournemouth.

Multifunctional Towns

Multifunctional towns represent a diverse spectrum, varying in scale and offerings, catering to a range of everyday requirements including convenience shopping, leisure activities, and employment opportunities. They exhibit a relatively consistent foot traffic pattern throughout the year. The footfall volumes reflect the catchment areas from which visitors are drawn from, with larger multifunctional centres, such as cities like Sheffield, attracting individuals from broader regions compared to smaller multifunctional centres, such as towns or districts like Chorlton in Manchester, which primarily serve local populations.

Speciality Towns

Speciality towns draw both tourists and local residents. Similar to holiday towns, they experience heightened activity during the summer months. However, they also exhibit a smaller secondary peak in foot traffic during December, indicating a hybrid characteristic blending aspects of holiday and comparison towns. These towns often feature anchor attractions, and offer distinctive and unique experiences, that are not linked with the retail offer. Specialty towns are fostering a strong sense of town identity. Locations like Windsor exemplify this dynamic.

We have adopted the four footfall patterns, as depicted in Figure 13, as reference templates for categorising town types in subsequent years. This approach enables us to track changes in places over time relative to these benchmarks. However, the footfall patterns for 2020 and 2021 were significantly disrupted by lockdowns and other COVID-related restrictions. Consequently, we conducted new clustering studies during these years, utilising them to analyse the varying degrees of 'COVID resilience' in English towns and cities. Given the differing timelines of COVID restrictions across the devolved nations, our clustering studies focused solely on English towns and cities to establish centroids for 2020 and 2021. Readers are encouraged to refer to our previous reports for detailed analysis during the COVID-19 pandemic and also the footfall annual review of 2022. In this current report, our emphasis is on comparing post-COVID footfall with pre-COVID footfall, so this reason we will return to our 2016 benchmark centroids and classify each town and city by finding its closest centroid. Our classification for 2023 town types can be found in [Appendix A](#), along with classifications of towns and cities for previous years. All these classifications are derived using the 2016 benchmark centroids from Figure 13, but we include only English towns and cities, to fit the focus of the High Streets Task Force. We will now take a closer look at the data in Appendix A, to discover how town types of English towns and cities have changed since 2019.

2019		Same towns in 2023			
Annual signature	**Number of towns**	**Number of towns Comparison**	**Number of towns Holiday**	**Number of towns Multifunctional**	**Number of towns Speciality**
Comparison	14	6	0	7	1
Holiday	10	0	9	1	0
Multifunctional	102	9	0	64	29
Speciality	50	5	5	12	28
Totals	176	20	14	84	58

Table 3: Showing how the classification of 176 English towns and cities has changed for each annual signature between 2019 and 2023.

To carry out this analysis we rely on data from the 176 English towns and cities that appear in both of the 2019 and 2023 columns in Appendix A. Table 3 (above) shows how many towns of each type have changed their classification between 2019 and 2023. Clearly, there have been a lot of changes, but overall, we note an increase in comparison, holiday and speciality towns at the expense of multifunctional towns. Whilst our classification of town types is helpful in understanding their purpose, it is important to note that every town is different, even within each type. To illustrate the variance in positions of retail hierarchy between towns of the same type, two of each town types is shown in Figure 14. The left-hand example of a comparison destination is a major town in the Southwest, whilst the righthand example is a regional centre in the north of England. The two holiday examples are both coastal towns, the one on the left being a sub-regional centre, and the one on the right a small town. The left-hand multifunctional signature is a regional centre in Greater London, and the righthand example is an industrial town in Lincolnshire. Finally, the speciality examples consist of a sub-regional centre in Greater London (left) and a historic sub-regional centre in the southeast.
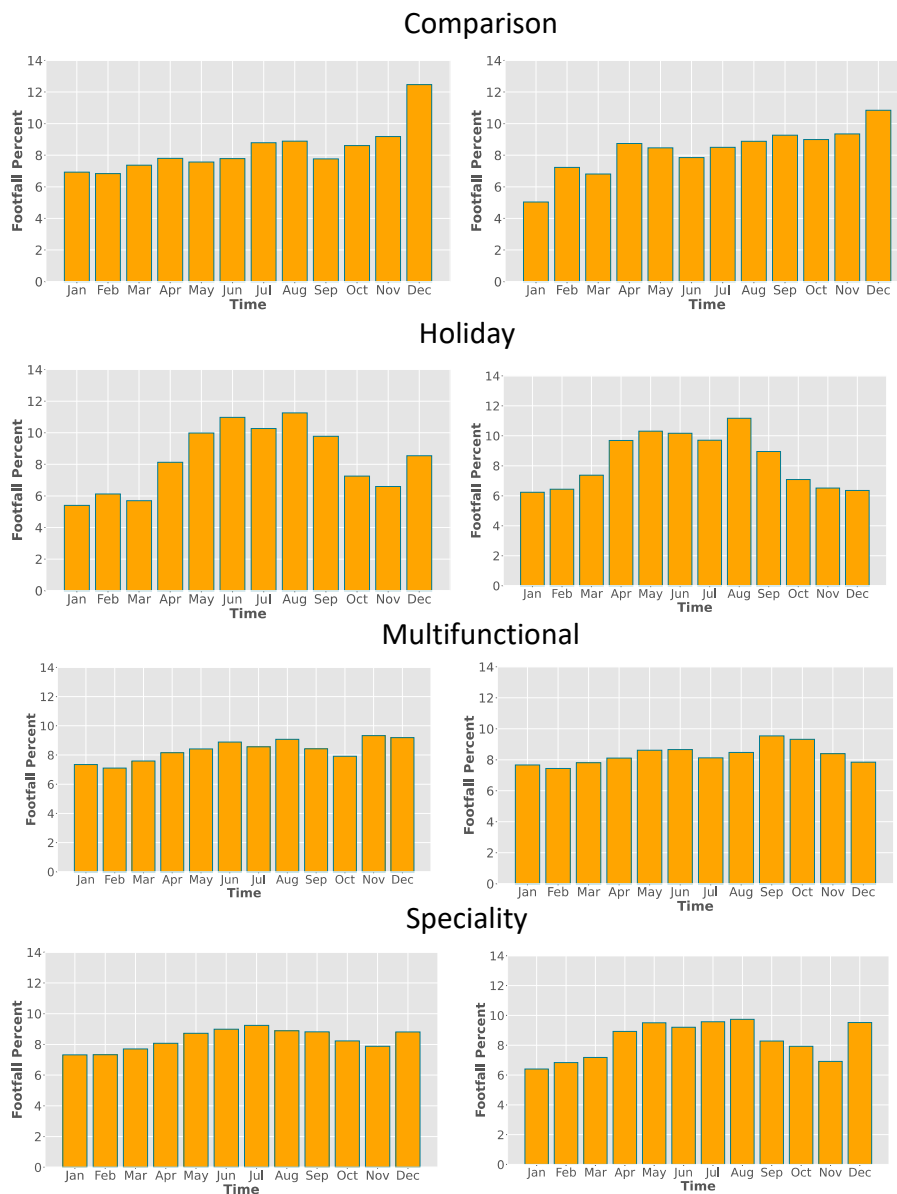
Figure 14: Annual signatures of eight sample towns and cities, two of each type, suggesting that towns of the same type/annual signature different positions in retail hierarchy, . **Comparison**: *(left) a* **major town** *in the Southwest, (right) a* **regional centre** *in the north of England.* **Holiday**: *(left) a* **sub-regional centre**, *(right) a* **small town**. **Multifunctional** *(left) a* **regional centre** *in Greater London, (right) an* **industrial town** *in Lincolnshire. Speciality: (left) a sub-regional centre in Greater London and (right) a historic sub-regional centre in the southeast.*

Finally, in this section, we focus on how the town types themselves may be evolving. Similar to the analysis we undertook during 2020/21 where we conducted new clustering studies, this time using data from 2022 and 2023 to investigate potential changes to the shape of the centroids.

Again, we use the same clustering methodology, *K*-Means and *n = 4.* In other words, we require the process to identify 4 classes and, for each class, a centroid – or pattern – that represents that class. The results of this analysis are presented in Figure 15 and Table 4. In Figure 15 the 4 classes are shown (in blue) alongside their closest match from our previous clustering analysis in 2019.
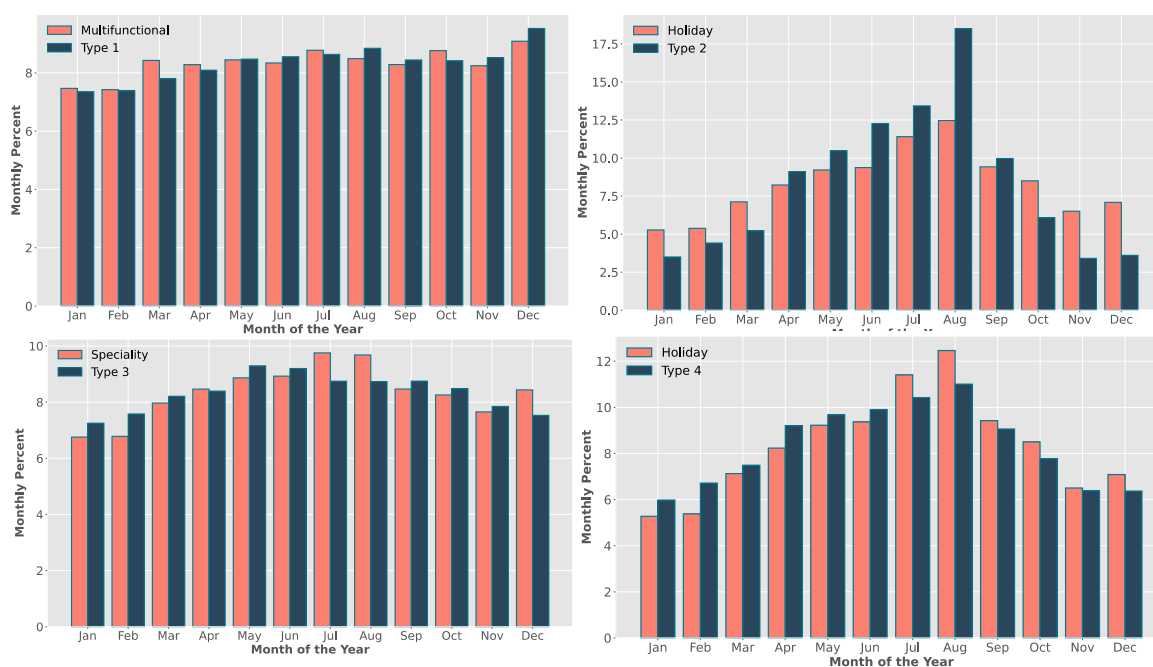
Figure 15: Comparison between annual centroids for 2023 with their closest match from 2016.

2023 centroid	Closest match to 2016 benchmarks	Same towns in 2023			
		Comparison	Holiday	Multifunctional	Speciality
Type 1	Multifunctional	1.699	6.464	**1.026**	2.258
Type 2	Holiday	15.914	**9.323**	15.517	13.328
Type 3	Speciality	4.020	5.783	2.126	**2.027**
Type 4	Holiday	6.554	**2.850**	5.465	3.413

Table 4: Percentage difference between 2023 annual centroids with the 2016 benchmarks.

We establish the closest match in Table 4 where we are looking for the least difference between the 2023 centroids (Types 1- 4) and the 2019 centroids (Comparison, Holiday, Multifunctional, and Speciality). The centroids or patterns illustrating the four town types that come from post-pandemic footfall data differ from those drawn from pre-pandemic data in one significant way. In the post-pandemic footfall data, we see no evidence of a comparison town type. Multifunctional, speciality and holiday town types remain.

Table 4 shows how the new town types relate to the 2016 benchmarks. Type 1 is similar to Multifunctional. Type 3 is similar to Speciality but both Type 2 and 3 are similar to Holiday. However, the Type 2 (2023) Holiday centroid is not as close to the 2016 Holiday centroid as Type 4 (2023).

Examining the shape of the centroids (Figure 15) we can see that the Type 2 (2023) Holiday centroid is characterised by a large August peak, and further investigation reveals that the Type 2 (2023) Holiday towns are seaside towns who may have experienced additional visitation after an unusually wet and cool July. The small number of locations with a Type 2 profile does not suggest we need to differentiate between types of holiday towns, and we do not expect to see evidence for two types of holiday town in 2024. What is more interesting is that we no longer see evidence for a comparison town type in the post-pandemic data. COVID-19 forced a change in shopping habits, and there was a huge growth in online shopping (according to the ONS rising to 37.8% in January 2021), at the expense of in-store. This accelerated the decline/downfall of many more major retail chains. Whilst online shopping fell after stores were reopened, it did not fall to match pre-pandemic levels (for example, according to the ONS online retail sales were 20.2% in Jan 2020 and 26.7% in Jan 2024). Commentators have suggested this is a mixture of changing consumer habits that have 'stuck' and the reduction in retail provision on the high street.

However, it is important that we test this finding with much more data. We have seen how one month's weather can affect the classifications, when we are dealing with a smaller data set. Therefore, we will continue to use our 2016 benchmarks, that were computed with 10 years of data. We will keep revisiting the centroids and town types though, on an annual basis, so that if more compelling evidence emerges of town type evolution, we can update our classes accordingly.

4.2 Weekly Signatures

In addition to annual signatures, Mumford *et al.* (2021) have examined footfall profiles for days of the week and discovered two distinct patterns. We have repeated the *K*-Means analysis for 2023 and have observed almost identical patterns for the two centroids as obtained in previous years. This is in contrast to the case for annual patterns, where the four centroids are much less stable, certainly in part because there is only one sample point per year for each town or city (the 12 months of the year), whereas, for the weekly analysis, there are 52 sample points. Figure 16 shows the two weekly centroids obtained for 2023.
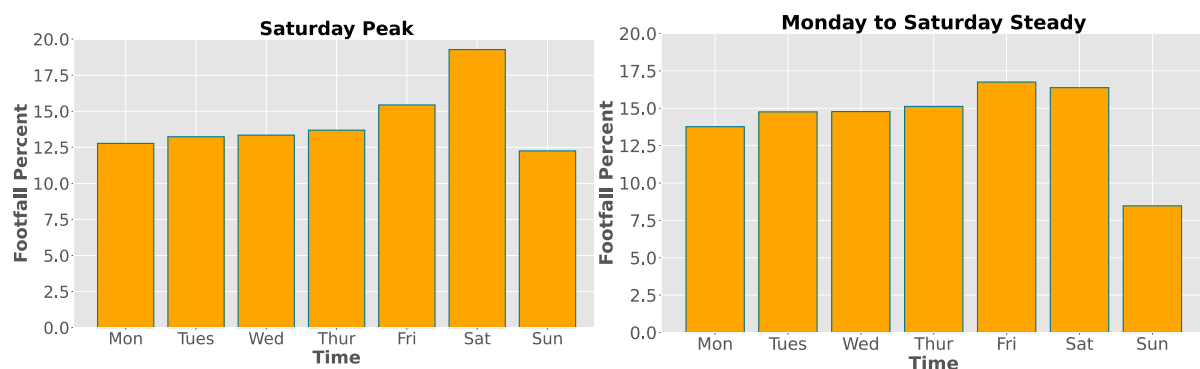
Figure 16: Weekly centroids for the UK in 2023, derived from 320 towns and cities.

Overleaf we outline the main features of the two types of centroids.

Saturday peak type towns typically show a large peak on Saturday followed by a reasonably busy Sunday. Saturday peak types tend to be larger locations used for weekend shopping (e.g., Manchester). However, not all locations in this category are large towns or cities, by any means.

Monday Through Friday Steady

Monday through Friday steady types show steady footfall from Monday to Friday with a slight peak on Saturday, followed by a large drop on Sunday. These tend to be less visited at the weekend (e.g., Morley), and are typically smaller destinations, although the class is made up of a great variety, both large, small and medium.

Table 5 gives the number of UK towns and cities in each weekly classification class. Clearly, the 'Saturday Peak' class is busier and towns and cities in this class tend to be the larger retail centres, as mentioned above. The variance of footfall patterns in the same type towns, Figure 17 presents two examples of each weekly class.

Weekly signature	Number of towns	Average Annual Footfall
Saturday Peak	170	5407377
Monday Through Saturday Steady	150	2452942
Total	320	-

Table 5: Weekly classification numbers for 320 UK towns and cities in 2023 showing average annual footfall in each class.
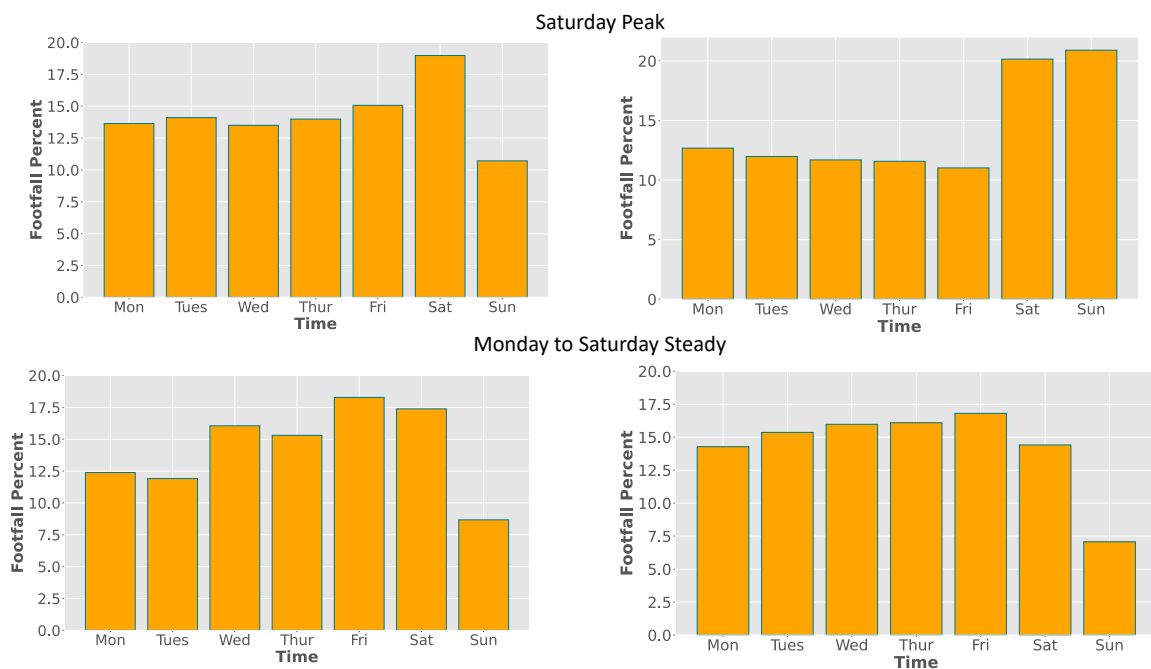
Figure 17: Example weekly signatures for four towns and cities.

The top left-hand signature is a sub-regional centre in the southwest, whilst on the right of this we have a rather strange-looking example which is from a small coastal town in East Anglia, that attracts visitors mainly at weekends. The "Monday to Saturday Steady" signatures consist of a regional centre in the east of England (left) and a small town in the east midlands (right).

4.3   Daily Signatures

Two daily footfall centroids classify centres based on their activity levels throughout the hours of the day: *All-day economy* towns and *midday economy*. Figure 18 displays the centroids obtained using *K*-Means clustering for the hours of the day in 2023. Below the figure, we outline the main features of the two types.
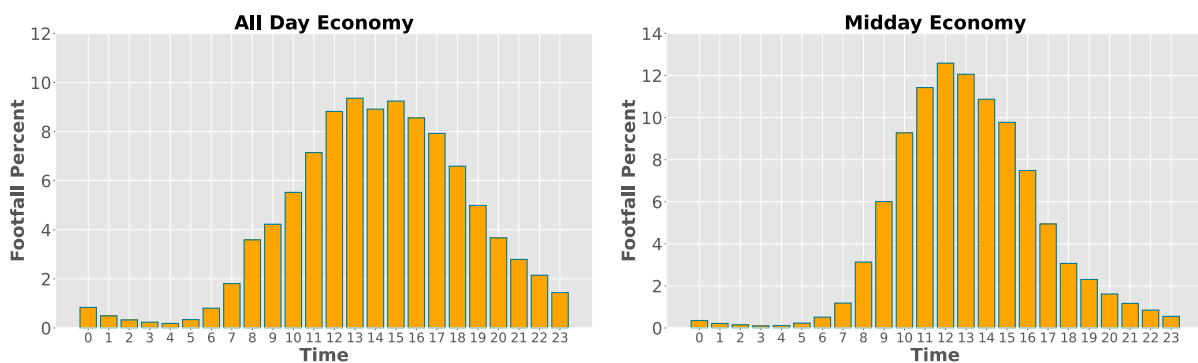
Figure 18: Daily centroids for 2023.

All Day Economy
All-day economy centroids computed before the pandemic generated a pattern with a single peak in footfall at 1 pm followed by a slow dropping away in the afternoon, and a reasonable footfall level continued into the evening/night-time. In 2023 (and also in 2022), however, we observe a slightly different pattern with two peaks, one at 1 pm and the other at 3 pm. All day economy towns have stronger evening and night-time economies than midday economy towns and tend to be busier overall. Liverpool is an example of an all-day economy.

Midday Economy
Midday economy towns tend to show a sharper and slightly earlier peak in footfall at noon, and footfall then trails off much more quickly into the afternoon and evening. Towns showing a midday economy tend to have less footfall than all day economy towns and cities (e.g., Royal Leamington Spa).

Table 6 gives the number of towns and cities in each category and the average annual footfall for each classification for 2023. We can see that places identified with an 'all-day economy' tend to be busier overall, as mentioned above. However, each category has a very broad membership of large, small and medium towns.

Daily signature	Number of towns	Average Annual Footfall
All Day Economy	118	5694144
Midday Economy	202	3042866
Total	320	-

Table 6: Daily classification numbers for 320 UK towns and cities in 2023 showing average annual footfall in each class.

Figure 19 gives some example signatures from the two classes of daily patterns. The top left signature is for a major town in West London and to right of that is a pattern from a major city in the north. The midday economy examples are a market town in the north (left) and a large seaside town in the southwest.
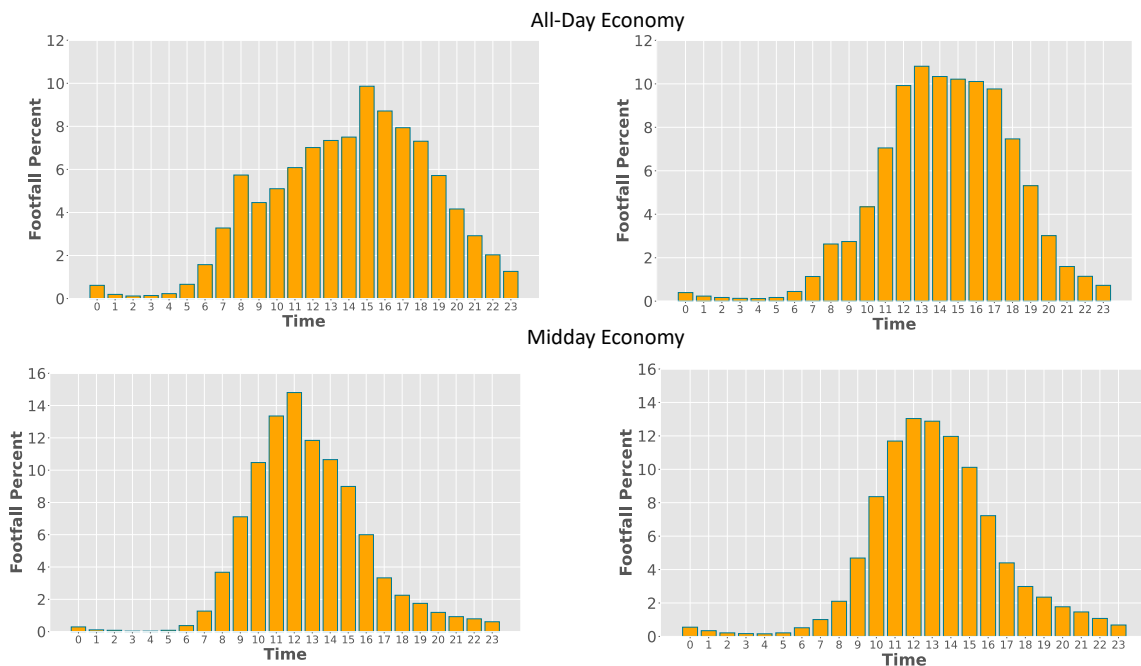
Figure 19: Example signatures of some individual towns from the two categories of daily footfall patterns.

4.4   Section Summary

In the previous sections, the main focus was on footfall volumes, first examining overall trends, and then looking at variations in footfall volumes between places and attempting to categorize them in terms of how busy they are. In contrast, the present section is concerned more with footfall patterns, and how footfall is spread out according to the month of the year, day of the week, and hour of the day. Here we are dealing more with percentages than absolute volumes. First, we examined town types, which are identified primarily by their annual footfall patterns into four categories: comparison (traditional shopping centres), holiday (typically coastal towns busiest in the summer), multifunctional (a mixed bag with relatively flat annual footfall profile), and speciality (attracting tourists and shoppers). Each town allocated to the category whose archetype its annual footfall profile most closely resembles, the archetypes (or benchmarks) being established a few years ago using the *K*-Means clustering algorithm on 10 years of historical data. We used these benchmarks to observe how towns

and cities have changed their town-type classifications between 2019 and 2023, noting that a lot of changes have taken place and that there has been an overall increase in comparison, holiday, and speciality towns at the expense of multifunctional towns. A sample of annual signatures of specific towns and cities completed this subsection, providing two examples of each town type. We also looked at town types that emerge from two years of post-pandemic data. Potentially, one of the most interesting findings of the study was the lack of evidence for a comparison town type. Whilst it is far too early to say, with any confidence, that comparison shopping is no longer the dominant function of any town, it is certainly a finding we will want to revisit with more data, in future. Nevertheless, we would expect to see changes in consumer behaviour and in the retail industry reflected in footfall signatures. This is what makes this type of data and analysis so useful, its ability to capture and reflect these changes.

In addition to annual footfall patterns, we also observed differences between places in footfall according to the day of the week and the hour of the day. Using *K*-Means clustering on 2023 weekly data, we discovered two main categories (centroids) depicted footfall levels for the different days of the week. These centroids were found to be very similar to the centroid patterns found in previous years, called: 'Saturday peak' and 'Monday through Saturday steady'. Places exhibiting the 'Saturday Peak' pattern, tend to be the busier towns and cities, although each type includes a variety of small, medium and large towns and cities, as reflected in our example signatures. The two classes derived by our K-Means analysis of daily footfall established the two classes depicting 'all day' and 'midday' economies, with the all day economy towns tending to be larger and busier than their midday economy counterparts.

Appendix A

Classification of Annual Signatures for English Towns

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Alfreton	-	-	Multifunctional	Multifunctional
Altrincham	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Ashford	Multifunctional	Multifunctional	Speciality	Speciality
Aylesbury	-	Multifunctional	-	-
Barnsley	Comparison	Multifunctional	Speciality	Multifunctional
Barnstaple	Comparison	Speciality	Speciality	Speciality
Barrow in Furness	-	-	Speciality	Speciality
Basingstoke	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Bath	-	Comparison	Comparison	Comparison
Battersea	-	-	Comparison	Comparison
Beckenham	-	-		Multifunctional
Bedford	Multifunctional	Multifunctional	Speciality	Multifunctional
Bedminster	-	-	Multifunctional	Speciality
Beeston	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Belper	-	-	Multifunctional	Multifunctional
Berkhamsted	-	Multifunctional	Comparison	Multifunctional
Bexleyheath	Multifunctional	Multifunctional	Multifunctional	Speciality
Birmingham	-	-	Comparison	Comparison
Bishops Cleeve	-	-	Multifunctional	Multifunctional
Blackburn	-	Multifunctional	Multifunctional	Multifunctional
Blackpool	Holiday	Holiday	Holiday	-
Blandford	-	-	-	Multifunctional
Bognor Regis	Speciality	Speciality	Speciality	Speciality
Bournemouth	Holiday	Speciality	Speciality	Holiday
Bradford	-	Multifunctional	Multifunctional	Multifunctional
Braintree	-	Multifunctional	Multifunctional	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Bramhall	-	-	Multifunctional	-
Brentford	Multifunctional	Speciality	Multifunctional	Comparison
Brentwood	-	-	Comparison	Multifunctional
Brierley Hill	-	Multifunctional	Multifunctional	Comparison
Brighouse	-	Multifunctional	Comparison	Multifunctional
Brighton	-	Speciality	Speciality	Speciality
Bristol	Comparison	Comparison	Comparison	Multifunctional
Brixton	Speciality	Speciality	Speciality	Speciality
Bromley	Comparison	Comparison	Speciality	Multifunctional
Broughton	-	-	Multifunctional	Speciality
Burnham on Sea	-	Holiday	Holiday	Holiday
Bury	-	-	Multifunctional	Multifunctional
Bury St Edmunds	Speciality	Speciality	Speciality	Speciality
Buxton	-	-	Speciality	Speciality
Cambridge	Multifunctional	Multifunctional	Speciality	Speciality
Camden	Multifunctional	Speciality	Speciality	Speciality
Canterbury	-	Multifunctional	Speciality	Multifunctional
Carlisle	-	-	Comparison	Multifunctional
Carnaby Village	-	-	-	Multifunctional
Chatham	-	-	Multifunctional	Multifunctional
Cheadle	-	-	Multifunctional	-
Cheadle Hulme	-	-	Multifunctional	-
Chelmsford	-	Multifunctional	Multifunctional	Speciality
Cheltenham	-	Comparison	Comparison	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Chester	-	-	-	Speciality
Chichester	Speciality	Speciality	Speciality	Multifunctional
Chiswick	-	-	Multifunctional	Multifunctional
Chorlton	-	Multifunctional	Multifunctional	Multifunctional
Clacton On Sea	Speciality	Speciality	Speciality	Multifunctional
Cleethorpes	Holiday	Speciality	Holiday	Holiday
Colchester	-	Multifunctional	Comparison	Multifunctional
Congleton	-	Speciality	Speciality	Multifunctional
Cosham	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Covent Garden	Speciality	Speciality	Comparison	Comparison
Coventry	-	-	-	Multifunctional
Cranleigh	-	-	Comparison	Multifunctional
Croydon	Multifunctional	Speciality	Multifunctional	Multifunctional
Cudworth	-	-	Multifunctional	Multifunctional
Darlington	-	Multifunctional	Speciality	Speciality
Dartford	Speciality	Holiday	Speciality	Multifunctional
Dartmouth	Holiday	Holiday	Holiday	Holiday
Darwen	-	-	-	Speciality
Derby	Multifunctional	Speciality	Multifunctional	-
Dewsbury	-	-	Multifunctional	Speciality
Doncaster	-	Multifunctional	Multifunctional	Multifunctional
Dover	-	Speciality	Speciality	Speciality
Dudley	-	Multifunctional	Speciality	Speciality
Durham	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Ealing	Multifunctional	Speciality	Speciality	Holiday
Eastleigh	Multifunctional	Speciality	Speciality	Multifunctional
Eccles	-	-	Speciality	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Eccles Barton	-	-	Speciality	Speciality
Edgeley	-	-	Speciality	-
Eltham	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Exeter	Comparison	Multifunctional	Multifunctional	Multifunctional
Fallowfield	-	Multifunctional	Speciality	Multifunctional
Falmouth	-	-	-	Holiday
Farnham	-	-	Multifunctional	Comparison
Feltham	-	-	Multifunctional	Multifunctional
Fitzrovia	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Floral Court	-	-	Comparison	Comparison
Fratton	-	-	-	Multifunctional
Future Wood Green	-	-	Speciality	Multifunctional
Gloucester	Comparison	Comparison	Speciality	Speciality
Godalming	-	-	Multifunctional	Multifunctional
Goldthorpe	-	-	Speciality	Speciality
Gorton	-	Multifunctional	Speciality	Multifunctional
Gravesend	Multifunctional	Multifunctional	Speciality	Multifunctional
Great Yarmouth	Holiday	Holiday	Holiday	Holiday
Greenwich	Speciality	Speciality	Multifunctional	Speciality
Grimsby	Speciality	Speciality	Speciality	Speciality
Guildford	Multifunctional	Multifunctional	Speciality	Speciality
Guisborough	Multifunctional	Multifunctional	Multifunctional	Speciality
Hale Village	-	-	-	Multifunctional
Halesowen	-	Multifunctional	Multifunctional	Speciality
Halifax	-	Multifunctional	Multifunctional	Multifunctional
Hammersmith	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Haringey	-	-	-	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Harlesden	-	Speciality	Speciality	Speciality
Harpenden	-	Multifunctional	Multifunctional	Multifunctional
Harpurhey	-	Speciality	Multifunctional	Speciality
Harrow	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Haslemere	-	-	Comparison	Comparison
Hastings	Holiday	Holiday	Holiday	Holiday
Havering - Colliers Row	-	Multifunctional	Speciality	Multifunctional
Havering - Elm Park	-	Multifunctional	Multifunctional	Speciality
Havering - Harold Hill	-	Multifunctional	Speciality	Speciality
Havering - Hornchurch	-	Multifunctional	Multifunctional	Multifunctional
Havering - Rainham	-	Speciality	Speciality	Speciality
Havering - Romford	-	Speciality	Speciality	Speciality
Havering - Upminster	-	Multifunctional	Speciality	Speciality
Haywards Heath	-	-	Comparison	Comparison
Hazel Grove	-	-	Speciality	-
Heanor	-	-	Multifunctional	Speciality
Heart of London	Speciality	Speciality	Speciality	Speciality
Hebburn	-	-	-	Speciality
Holbeach	-	-	-	Multifunctional
Holmfirth	-	Multifunctional	Speciality	Speciality
Horsham	-	Comparison	Comparison	Speciality
Hounslow	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Hoyland	-	-	Multifunctional	Multifunctional
Huddersfield	-	Multifunctional	Multifunctional	Multifunctional
Hull	Comparison	Comparison	Comparison	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Huntingdon	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Huyton Village	-	Multifunctional	Multifunctional	Multifunctional
Ilford	Speciality	Speciality	Multifunctional	Multifunctional
Ingatestone	-	-	Multifunctional	Multifunctional
Ipswich	Comparison	Comparison	Multifunctional	Speciality
Irlam	-	-	Multifunctional	Multifunctional
Irlams O' Th' Height	-	-	Speciality	Speciality
Islington	-	Multifunctional	-	Multifunctional
Jarrow	-	-	-	Speciality
Kendal	-	Multifunctional	Speciality	Multifunctional
Kenilworth	Speciality	Speciality	Multifunctional	Multifunctional
Kensington	Speciality	Speciality	Speciality	Speciality
King's Cross	-	-	-	Multifunctional
King's Lynn	-	-	Comparison	Comparison
King's Road	-	-	-	Speciality
Kingston	-	-	Holiday	Speciality
Kirkham	-	-	Multifunctional	-
Knightsbridge	-	-	Comparison	Comparison
Lancaster	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Langworthy	-	-	Multifunctional	Multifunctional
Leamington Spa	Comparison	Multifunctional	Multifunctional	Multifunctional
Leeds	Multifunctional	Multifunctional	Multifunctional	Comparison
Leicester	-	-	Multifunctional	Multifunctional
Leicester Square	Speciality	Speciality	Holiday	Speciality
Levenshulme	-	Speciality	Speciality	Speciality
Lichfield	-	Speciality	Speciality	Comparison
Liverpool	Comparison	Multifunctional	Speciality	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Loughborough	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Luton	Multifunctional	Speciality	Multifunctional	Multifunctional
Macclesfield	-	Multifunctional	Multifunctional	Multifunctional
Maidenhead	Comparison	Speciality	Speciality	-
Maidstone	Comparison	Multifunctional	Multifunctional	Multifunctional
Manchester	Comparison	Comparison	Comparison	Comparison
Manchester - Cheetham Hill	-	Speciality	Speciality	Speciality
Manchester - Rusholme	-	Speciality	Speciality	Speciality
Mansfield	Multifunctional	Speciality	Speciality	Speciality
Market Harborough	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Marple	-	-	Multifunctional	-
Mayfair	Multifunctional	Multifunctional	Comparison	Multifunctional
Melton Mowbray	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Middlesbrough	-	-	Multifunctional	Multifunctional
Minehead	-	-	Holiday	Multifunctional
Monton	-	-	Speciality	Speciality
Morley	-	Multifunctional	Speciality	Multifunctional
New Bond Street	-	Comparison	Comparison	Comparison
New Ferry	-	-	-	Multifunctional
New West End	Multifunctional	Multifunctional	Comparison	Comparison
Newbury	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Newcastle	Multifunctional	Multifunctional	Speciality	Speciality
Newquay	Holiday	Holiday	Holiday	Holiday
Newton Abbot	-	-	Speciality	Speciality
North Walsham	-	-	Speciality	Speciality
Northampton	Multifunctional	Multifunctional	Speciality	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Northbank	Multifunctional	Multifunctional	Multifunctional	Speciality
Northenden	-	Multifunctional	Speciality	-
Norwich	Speciality	Multifunctional	Comparison	Multifunctional
Nottingham	Multifunctional	Multifunctional	Comparison	Comparison
Oldham	Speciality	Speciality	Multifunctional	Multifunctional
Ormskirk	-	Speciality	Speciality	Speciality
Oxford	Multifunctional	Multifunctional	Multifunctional	Speciality
Pendleton	-	-	Multifunctional	Multifunctional
Penge	-	-	Multifunctional	Speciality
Penistone	-	-	Multifunctional	Speciality
Petersfield	-	Multifunctional	Comparison	Comparison
Plymouth	Comparison	Multifunctional	Multifunctional	Comparison
Poole	Holiday	Holiday	Holiday	Holiday
Portsmouth	Comparison	Comparison	Multifunctional	Multifunctional
Prescot	-	Multifunctional	Speciality	Speciality
Preston	-	Speciality	Speciality	-
Ramsey	-	-	Multifunctional	Speciality
Reading	Multifunctional	Multifunctional	Comparison	Multifunctional
Redcar	Speciality	Speciality	Holiday	Holiday
Reddish	-	-	Multifunctional	-
Regent Street	Multifunctional	Multifunctional	Comparison	Comparison
Richmond	-	Multifunctional	Multifunctional	Multifunctional
Ripley	-	-	Multifunctional	Multifunctional
Rochdale	-	Multifunctional	Multifunctional	Multifunctional
Romiley	-	-	Multifunctional	-
Rotherham	Speciality	Multifunctional	Speciality	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Royston	-	-	Speciality	Multifunctional
Rugby	Speciality	Speciality	Multifunctional	Multifunctional
Salisbury	Comparison	Speciality	Speciality	Comparison
Saltburn	Speciality	Speciality	Speciality	Speciality
Scarborough	Speciality	Speciality	Holiday	Speciality
Scunthorpe	Comparison	Speciality	Multifunctional	Multifunctional
Sedgley	-	Multifunctional	Multifunctional	Multifunctional
Sheffield	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Shepherds Bush	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Shoreditch	-	-	-	Multifunctional
Shrewsbury	Multifunctional	Comparison	Multifunctional	Multifunctional
Skipton	-	Speciality	Speciality	Speciality
Sleaford	Multifunctional	Multifunctional	Speciality	Speciality
Sloane Street	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Slough	-	Multifunctional	Speciality	Speciality
Solihull	-	-		Multifunctional
South Shields	-	-	Speciality	Speciality
Southampton	-	Comparison	Comparison	Comparison
Southfields	-	-	Speciality	Speciality
Southport	Speciality	Speciality	Speciality	Holiday
Southsea	Speciality	Speciality	Speciality	Speciality
Spalding	-	-	-	Speciality
Spennymoor	Speciality	Speciality	Speciality	Speciality
St Christopher's Place	-	-	Comparison	Comparison
St Ives	-	-	Multifunctional	Multifunctional
St Neots	-	-	Multifunctional	Multifunctional
Stafford	Multifunctional	Multifunctional	Speciality	Multifunctional

Classification of Annual Signatures for English Towns (cont)

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Stalybridge	-	-	Speciality	Holiday
Stockton-on-Tees	Multifunctional	Speciality	Speciality	Speciality
Stoke-on-Trent	Multifunctional	Multifunctional	Speciality	Speciality
Stratford Upon Avon	Holiday	Holiday	Holiday	Holiday
Sunderland	Comparison	Comparison	Multifunctional	Comparison
Sutton	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Swindon	Comparison	Multifunctional	Multifunctional	Multifunctional
Swinton	-	-	Speciality	Speciality
Taunton	Comparison	Comparison	Comparison	Multifunctional
Tewkesbury	-	-	Multifunctional	Speciality
Trowbridge	-	-	Multifunctional	Multifunctional
Truro	-	Comparison	Comparison	Comparison
Victoria	-	-	-	Multifunctional
Victoria Avenue	-	Multifunctional	Speciality	Speciality
Wakefield	-	Speciality	-	-
Walkden	-	-	Multifunctional	Multifunctional
Walsall		Speciality	Multifunctional	Multifunctional
Walthamstow	Speciality	Speciality	Speciality	Holiday
Warrington	-	-	Multifunctional	Speciality
Warwick	Speciality	Speciality	Speciality	Speciality
Waterloo	Speciality	Speciality	Speciality	Multifunctional
Watford	Multifunctional	Multifunctional	Multifunctional	Multifunctional
Wealdstone	-	-	Speciality	Speciality
Wellingborough	Multifunctional	Multifunctional	Speciality	Speciality
Wells-next-the-Sea	-	-	-	Holiday
Wembley	-	Multifunctional	Multifunctional	Multifunctional

Classification of Annual Signatures for English Towns (cont

Retail Centre	Signature Type			
	2014 - 2016	2017 - 2019	2022	2023
Westminster	-	Multifunctional	Speciality	-
Weston Super Mare	Holiday	Holiday	-	-
Wey Hill	-	-	Speciality	Speciality
Weymouth	Holiday	Holiday	Holiday	Holiday
Wigan	-	-	-	Multifunctional
Willesden Green	-	Multifunctional	Multifunctional	Speciality
Wimbledon	Multifunctional	Multifunctional	Speciality	Speciality
Winchcombe	-	-	Speciality	Speciality
Windsor	Comparison	Speciality	Speciality	Speciality
Wisbech	-	-	Speciality	Speciality
Withington	-	Multifunctional	Multifunctional	Speciality
Woking	-	-	Speciality	Speciality
Wolverhampton	Multifunctional	Multifunctional	Multifunctional	Comparison
Wombwell	-	-	Multifunctional	Multifunctional
Woolwich	Comparison	Multifunctional	Speciality	Speciality
Worcester	-	Multifunctional	Comparison	Multifunctional
Workington	-	-	Comparison	Multifunctional
Worthing	Comparison	Comparison	Multifunctional	Comparison
York	Comparison	Comparison	Multifunctional	Comparison