SPRINGBOARD.

September 2020

Month commencing 30 August 2020

UK footfall benchmarks

Footfall continued to strengthen in September, although the improvement slowed, with footfall dropping by-28.2% compared with -30.8% in August, which had previously improved from -39.4% in July. This was partly a consequence of the start of the school term, which led to footfall shifting downward from -25% in the first week of the month to -28.7% by the third week. However, this was then exacerbated by the introduction of greater restrictions on movement from the third week onwards, which meant that by the last week of September the decline in footfall reached -31.4%.

The greatest impact has been felt by high streets, which is unsurprising given the concentration of hospitality here; in the second half of the month following the compulsory 10pm closure of hospitality outlets high street footfall moved downward from -34.3% to -39.4% compared with a much more marginal decline in shopping centres (-32.6% to -33.7%) and an improvement in retail parks (-12.5% to -11.8%). In fact, retail parks have consistently outperformed high streets and shopping centres, and in September footfall during day time trading hours in retail parks was just 7.3% lower than in 2019.

Inevitably the greatest impact on consumer activity of the increased government restrictions is during the evening - indeed this is exactly the desired policy outcome - with the decline in high street footfall post 8pm of -44.7% and -42.1% between 5pm and 8pm compared with -30.7% between 9am and 5pm. This suggests that for many hospitality operators who are missing their second sitting and therefore losing a significant proportion of turnover, a way forward could be to bring forward dining times and encourage customers to eat earlier.

The earlier hospitality closure is a further challenge for large city centres in recovering lost footfall. Our data was the first to identify a far greater reduction in activity in large cities than in smaller high streets early on in the lockdown period as shoppers stayed local, and this is a trend that has been ongoing, with Central London being by far the hardest hit. In September, footfall in regional cities declined by -35.8% (from -35% in August) and by -56.4% in Central London, versus just -24.2% in Outer London and -23.5% in market towns across the UK. This is the first conclusive evidence of the importance to local economies of the working population, and suggests that there could be a fundamental long term change in bricks and mortar retailing if working from home becomes an embedded long term trend.

Springboard index
year on year
-28.2%
month on month
+1.2%

High streets
year on year
-34.6%
month on month
+1.9%

Shopping centres
year on year
-31.5%
month on month
+0.2%

Retail parks
year on year
-10.8%
month on month
+0.8%

Author
Diane Wehrle
Marketing and Insights Director

SPRINGBOARD.

September 2020

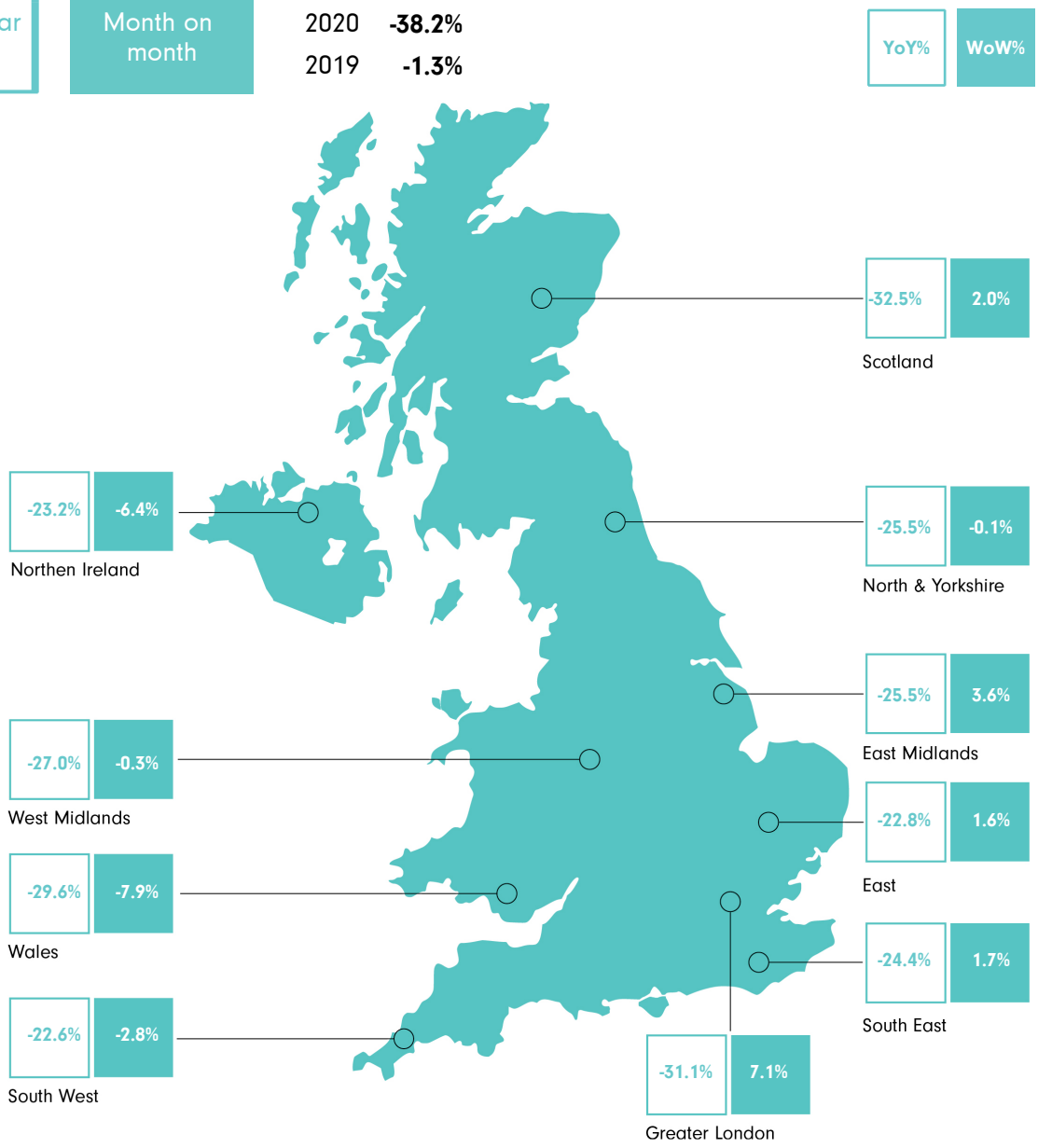
Month commencing 30 August 2020

Springboard index

-28.2%	+1.2%
Year on Year	Month on month

Year to date

2020	-38.2%
2019	-1.3%



The Springboard Index is a national index, encompassing the overall UK result for each of the three destination types. The result for each destination type is based on the comparison of the average footfall volume across all individual locations of that type between one period and another (eg. last week and the same week last year). The Springboard Index is an average of these results, weighted by their respective influence in terms of footfall volume.

SPRINGBOARD.

September 2020

Month commencing 30 August 2020

High street index

High street results by region

	YoY %	MoM%
East	-24.3%	2.8%
East Midlands	-28.2%	5.8%
Greater London	-44.1%	8.3%
Northern Ireland	-27.4%	-7.7%
North & Yorkshire	-29.3%	-0.8%
Scotland	-39.6%	1.1%
South East	-29.8%	2.7%
South West	-24.7%	-6.1%
Wales	-32.4%	-9.1%
West Midlands	-26.8%	0.3%

-34.6%
Year on year

+1.9%
Month on month

Year to date :		
	2020	-43.6%
	2019	-1.6%

Coastal towns

-19.7%
Year on year

-11.1%
Month on Month

Historic towns

-26.7%
Year on year

+3.3%
Month on Month

Regional cities

-44.4%
Year on year

+0.9%
Month on Month

Market towns

-23.5%
Year on year

+1.1%
Month on Month

SPRINGBOARD.

September 2020

Month commencing 30 August 2020

Shopping centre index

Shopping centre results by region

	YoY %	MoM%
East	-31.9%	0.3%
East Midlands	-31.6%	5.6%
Greater London	-28.4%	5.7%
North & Yorkshire	-32.9%	-0.3%
Scotland	-38.9%	5.5%
South East	-28.7%	-2.3%
South West	-25.0%	0.8%
Wales	-39.9%	-8.3%
West Midlands	-37.4%	-6.5%

-31.5%
Year on year

+0.2%
Month on month

Year to date :		
	2020	-40.5%
	2019	-2.4%

Up to 100,000 Sqft

-28.3%
Year on year

-0.1%
Month on month

100,000 to 250,000 Sqft

-31.1%
Year on year

+0.5%
Month on month

250,000 to 500,000 SqFt

-29.4%
Year on year

+1.0%
Month on month

500,000 Sqft and above

-35.0%
Year on year

-0.1%
Month on month

SPRINGBOARD.

September 2020

Month commencing 30 August 2020

Retail park index

Retail park results by region

	YoY %	MoM%
East	-10.1%	0.6%
East Midlands	-13.3%	-3.4%
Greater London	-5.9%	6.1%
North & Yorkshire	-9.3%	1.5%
Scotland	-10.3%	0.0%
South East	-8.2%	3.7%
South West	-15.4%	0.6%
Wales	-12.6%	-4.7%
West Midlands	-16.2%	5.0%

-10.8%
Year on year

+0.8%
Month on month

Year to date :		
	2020	-24.2%
	2019	+0.5%

-13.5%
Year on year

+1.1%
Month on month

Up to 125,000 SqFt

-9.5%
Year on year

+2.8%
Month on month

125,000 - 200,000 SqFt

-13.1%
Year on year

-1.5%
Month on month

200,000 - 275,000 SqFt

-7.5%
Year on year

-0.3%
Month on month

Over 275,000 SqFt

SPRINGBOARD.

September 2020

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UK weather report

Number of days this month					Average high temperature for September 2020	Average high temperature for September 2019
Aberdeen	22	4	9		15°	16°
Edinburgh	17	6	12		16°	17°
Glasgow	12	8	14	1	15°	17°
Newcastle	20	5	10		16°	17°
Belfast	15	3	15	2	16°	17°
Leeds	20	5	9	1	18°	19°
Liverpool	18	2	12	3	18°	18°
Manchester	16	5	13	1	18°	18°
Birmingham	19	5	9	2	19°	19°
Norwich	15	8	12		19°	21°
London	18	6	10	1	21°	22°
Cardiff	23	3	9		18°	19°
Bristol	22	2	11		18°	19°
Exeter	19	4	10	2	21°	19°