Quarterly Footfall Analysis
Loughborough 4th quarter in 2019 & 2020

Making quarterly comparisons

This quarterly analysis of footfall focuses on understanding the impacts of the ongoing COVID-19 pandemic on Loughborough town centre. The analysis has been undertaken by the People & Places Partnership using data generated by Proximity Futures GEO-Sense footfall monitoring system for the LOVE Loughborough BID.

The analysis compares data from the pre-pandemic 4th quarter of 2019 and the same period in 2020 when various measures were in place to help manage the impacts of COVID-19. Comparisons between quarters either side of the outbreak of the pandemic are challenging to assess and analysis is designed to provide valuable insights to help inform local place-leadership at this important time.

National context

It is helpful to undertake this analysis based on a wider understanding of national trends relating to town centres and the COVID-19 pandemic. Such information is important in understanding how the management of public spaces and reopening of businesses can provide a warm and safe welcome to town.

As context to the behaviour of town centre users in Loughborough, it is especially informative to consider data on customers' sentiments, included in the People & Places' wider tracking of national trends. According to research findings from the start of the 4th quarter in 2020, the following percentages of UK residents were changing their behaviour at least in part to avoid the following:

- crowded areas (88%)
- working outside their home (49%)
- going to shops (64%)

Overall patterns

The overall footfall patterns, twenty-four-seven, for the period indicate that footfall in the 4th quarter of 2020 had fallen to 44.2% of its 2019 level.

The day-around data does though indicate that the proportion of customers visiting the town centre weekly in 2020 (29.1%), was higher than that experienced in 2019 (21.4%). Equally there was also an increase in the proportion of new visitors to Loughborough in the 4th quarter of 2020 (17.2%), compared to 2019 (15.6%).
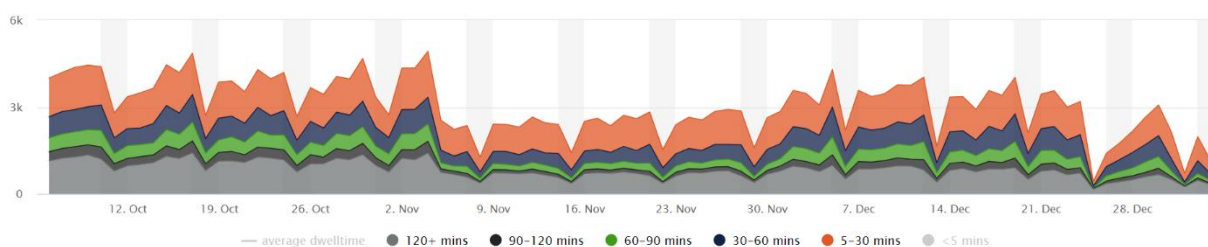
Average dwell times were also slightly higher in 2020 (121 minutes) compared to 2019 (118 minutes).

Overall footfall & dwell times

4th quarter 2019 (combined busiest day 27,130)
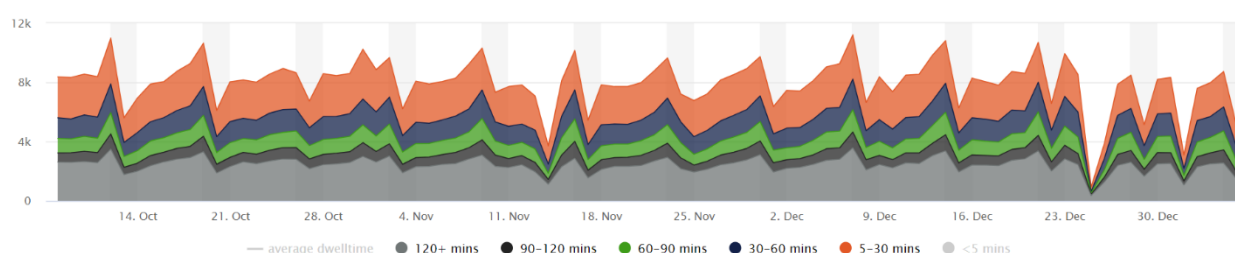
4th quarter 2020 (combined busiest day 13,877)


Daytime economy

Key aspects of daytime footfall (08.00-18.00) trends identified through separate analysis included:

- footfall in 2020 has on average fallen to 47% of its 2019 level for the period.

- fluctuations in footfall caused by changing restrictions, mask some positive trends. During the day before the November lockdown, for example, daytime footfall levels reached 64.6% of the 2019 levels.

- the first Saturday of December was the busiest day in both years, though 2020 levels were 54.6% of those in 2019.

- the busiest time of day remains, or is once again, lunchtime (12.00-13.00).

- the Market Place is consistently the busiest daytime location between years, although it has also experienced the greatest decline to 41.5% of its 2019 level.

- Baxter Gate is the least busy of the monitored locations, as opposed to the High Street during the daytime in 2019.

- average daytime dwell times have decreased slightly between 2019 (105 minutes) and 2020 (102 minutes).

- 5.3% less shoppers in 2020 are dwelling more than 90 minutes; whilst 4.6% more are in and out of town in less than 30 minutes.

- there is a divergence in the balance of repeat & new visitors between years, with a higher proportion of new visitors in town during the day in 2020 (28.0%) relative to 2019 (20.5%). This could be explained by an increase in working from home; changes in students' movement patterns and extended bank opening hours relative to neighbouring towns were closed.

Daytime footfall & split of new and repeat visitors

4th quarter 2019 (combined daily high, Saturday 07-12-19, 22,909)
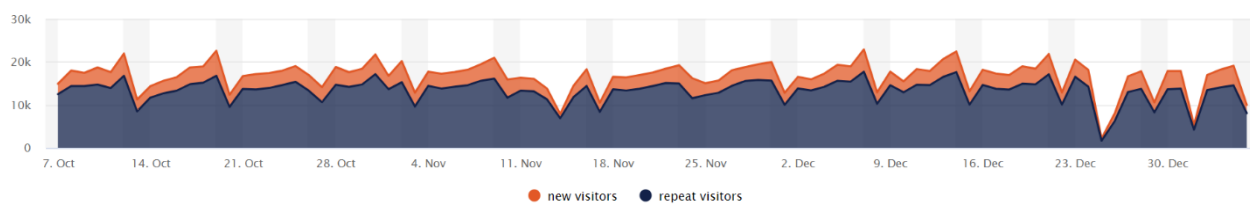
4th quarter 2020 (combined daily high, Wednesday 04-11-20, 12,247)
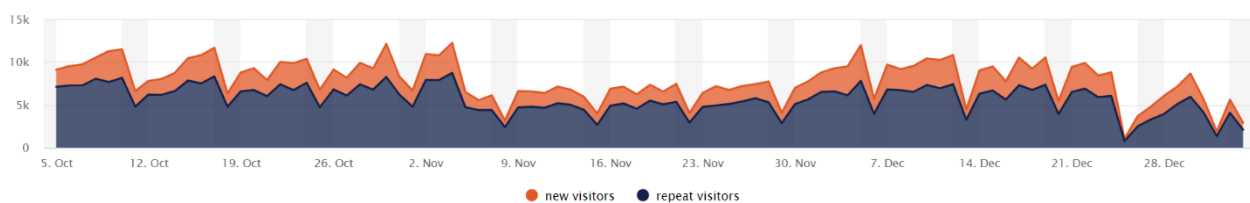
Evening economy

On average for the 4th quarter of 2020, evening footfall (18.00-23.00) is 32% of its 2019 level. Within this average, the following distinctive patterns are discernible:

- evening footfall in the middle Friday of the second lockdown was only 11% of the 2019 levels experienced during Loughborough Fair.

- the autumn lockdown figures in-part masked the potential to recover when hospitality businesses are more able to operate. On the Friday before Loughborough moved into tier 3 at the end of October, for example, footfall levels were 48% of those experienced for that same night in 2019.

- the busiest time of night remained early evening from 18.00-19.00.

- the Rushes was consistently the busiest location with the highest proportion of evening footfall in both 2019 (21%) and 2020 (22.9%).

- evening dwell times were on average 6 minutes longer in the 4th quarter of 2020 (111 minutes) compared to 2019 (105 minutes).

- there was the same proportion of evening visitors in 2020 who dwelt over 90 minutes (44.7%) and 3.1% more who dwelt under 30 minutes, compared to 2019.

Summary of Key Indicators for 4th Quarter 2019 & 2020	07-10-19 to 05-01-20	05-10-20 to 03-01-21
24 hours		
Total visits for period	1,791,363	792,143
Busiest time of day	12.00-13.00	12.00-13.00
Average dwell time	118 minutes	121 minutes
Dwell over 90 minutes (%)	39.1%	33.8%
Average visits per day	19,711	8,801
Busiest zone	Market Place	Market Place
Quietest zone	Baxter Gate	Baxter Gate
Balance of repeat & new visitors	78.6% : 21.4%	71.5% : 28.5%
Frequency of visits	Last week / Last month / Infrequent / New	Last week / Last month / Infrequent / New
	21.4% 48.5% 14.5% 15.6%	29.1% 40.8% 13.0% 17.2%
Busiest 24hrs & number of visits (1st year & comparison)	Saturday 19-10-19 / 27,130	Saturday 17-10-20 / 14,176
Busiest 24hrs & number of visits (2nd year & comparison)	Friday 01-11-19 / 21,824	Saturday 31-10-20 / 13,877
Day time (08.00-18.00)		
Total visits for period	1,522,891	720,104
Busiest time of day	12.00-13.00	12.00-13.00
Average dwell time	105 minutes	102 minutes
Dwell over 90 minutes (%)	37.2%	31.9%
Average visits per day	16,735	7,913
Busiest zone	Market Place	Market Place
Quietest zone	High Street	Baxter Gate
Balance of repeat & new visitors	79.5% : 20.5%	72% : 28.0%
Busiest day & number of visits (1st year & comparison)	Saturday 07-12-19 / 22,909	Saturday 05-12-20 / 11,980
Busiest day & number of visits (2nd year & comparison)	Wednesday 06-11-19 / 17,651	Wednesday 04-11-20 / 12,247
Evening (18.00-23.00)		
Total visits for period	382,420	212,265
Busiest time of day	18:00-19:00	18:00-19:00
Average dwell time	105 minutes	111 minutes
Dwell over 90 minutes (%)	44.7%	45.2%
Average visits per evening	4,202	1,332
Busiest zone	The Rushes	The Rushes
Quietest zone	Biggin Street	Biggin Street
Balance of repeat & new visitors	80.0% : 20.0%	76.9% : 23.1%
Busiest evening & number of visits (1st year & comparison)	Friday 15-11-19 / 8,108	Friday 13-11-20 / 1,029
Busiest evening & number of visits (2nd year & comparison)	Friday 01-11-19 / 5,486	Friday 30-10-20 / 2,617

Foot-flow around town

The GEO-Sense system provides graphical representations of dynamic data over time and between locations through the heatmaps and visitors' journeys pages on its portal. This enables the tracking of foot-flow data between specific locations and over extended periods.
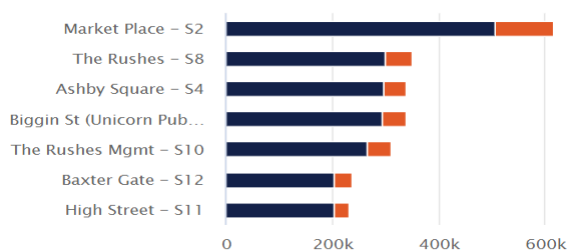
Daytime

- the dynamic footfall hotspot and visitor journey maps show the continued daytime importance between the years of the loop between the Market Place, the Rushes, Ashby Square and Biggin Street.

- the 2020 maps indicate the relative continued importance of the principal routes around town with a proportionally modest increase in footfall between Rushes and Ashby Square.
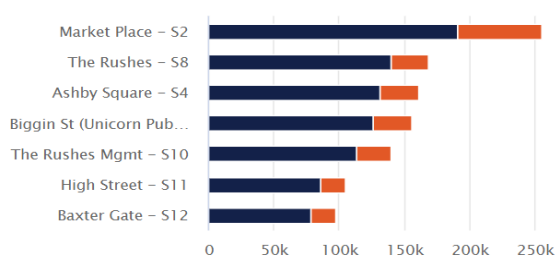
Evening

- the hotspots and visitor journey maps show the importance in the evening economy of Baxter Gate alongside the Market Place, the Rushes and Ashby Square. The High Street also appears relatively busier than during the day, probably due to pedestrian passing through.

- under tier 3 restrictions in 2020, indicative evening footfall levels for most locations are around a third of 2019 levels. In the Market Place footfall levels have declined to just over a fifth of 2019.

- in 2020, there were significant levels of movement between Ashby Square and the Rushes, and foot-flow between Baxter Gate and the High Street has increased. There is much less movement to and from the Market Place.
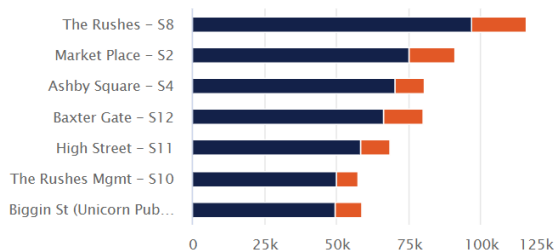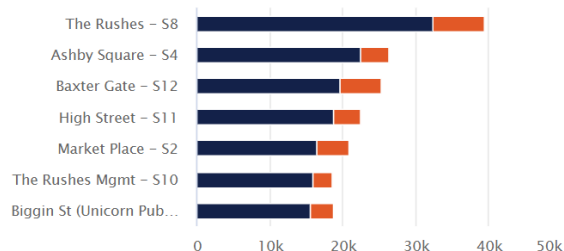
Busiest Daytime Zones for 4th Quarter 2019

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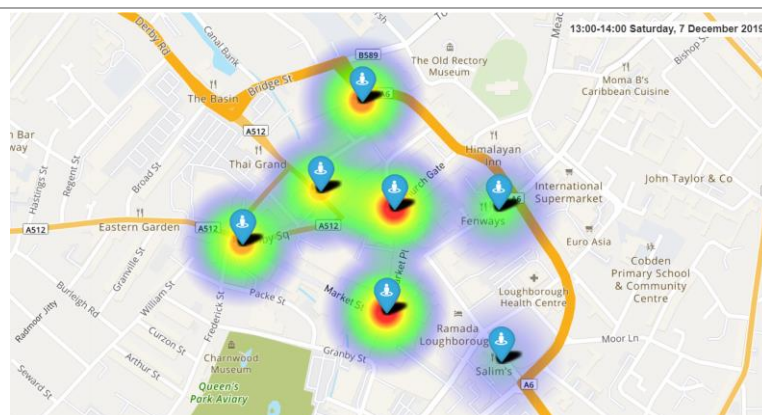

Busiest Evening Zones for 4th Quarter 2019

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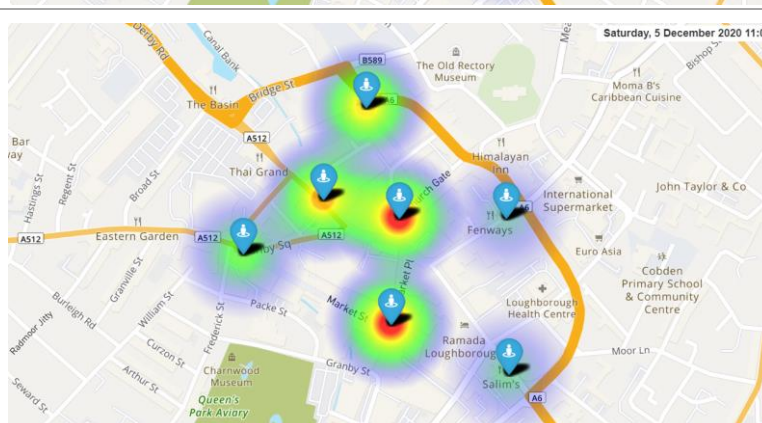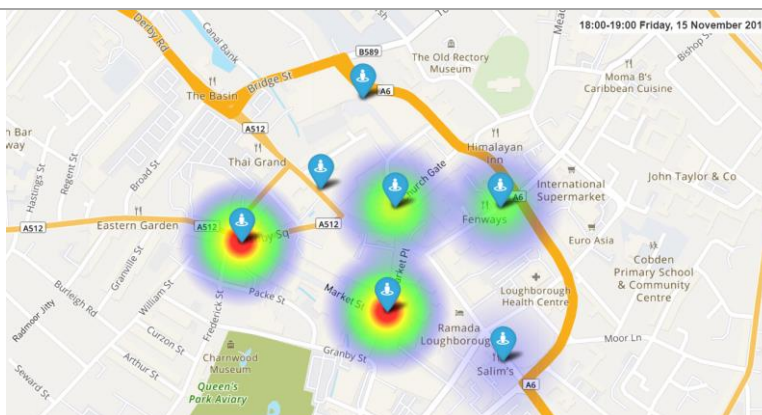| Comparison of Footfall Heatmaps for 4th Quarter in 2019 & 2020	
Busiest daytime 2019 Saturday, 7th December 2019; total recorded visits 22,909; Peak 13.00-14.00; 4526 visitors at peak. Busiest zones: • Market Sq. (2018) • Biggin St. (945) • Rushes Mngt (831) • Ashby Sq. (813)	
Comparison daytime 2020; Saturday, 5th December 2020; total recorded visits 12,517; Peak 11.00-12.00; 2,278 visitors at peak Busiest zones: • Market Sq. (966) • Biggin St. (472) • Rushes (355) • Ashby Sq. (354)	
Busiest evening 2019; Friday, 15th December 2019; total recorded visits 8,108; peak 18.00-19.00. 2818 visitors at peak. Busiest zones: • Rushes (294) • Baxter Gate (214) • Ashby Sq. (212) • Market Sq. (2018)	
Comparison evening 2020; Friday, 13th December 2020; total recorded visits 1,029; peak 18.00-19.00; 455 visitors at peak. Busiest zones: • Rushes (78) • Ashby Sq. (52) • High St. (50) • Baxter Gate (46)	
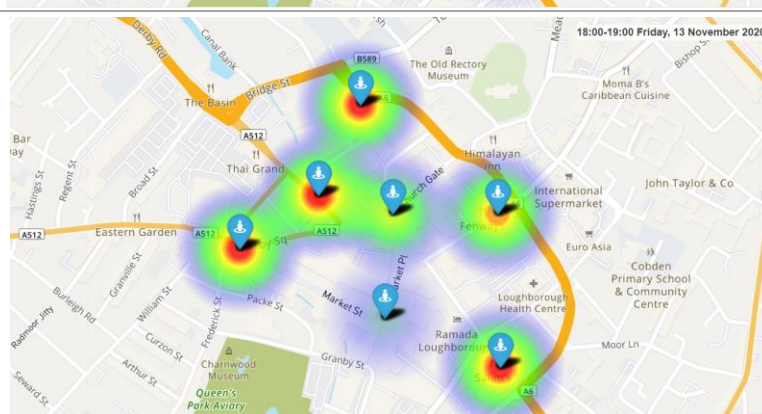
Sample Visitor Journey Maps for Daytime and Evening in Loughborough Town Centre

05-12-20 (daytime)
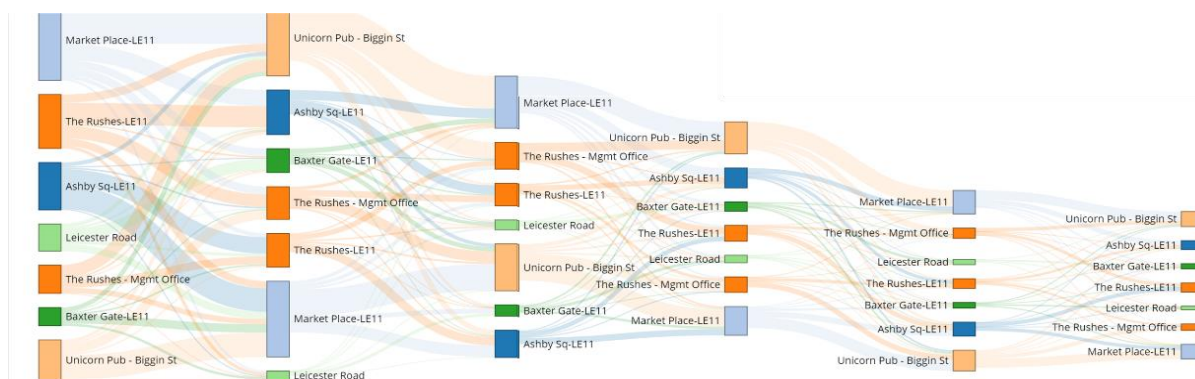
05-12-20 (evening)
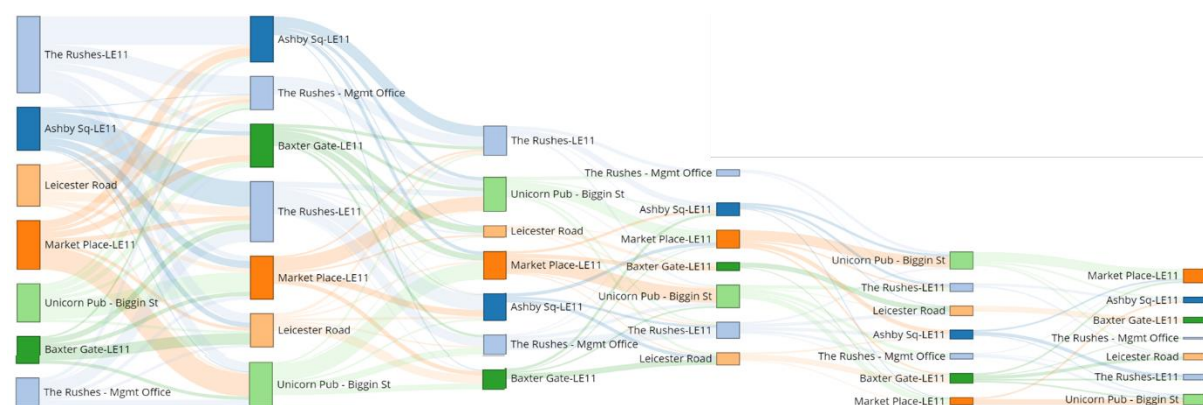
Recent town centre changes

The focus of this quarterly analysis is the need to know more about the impacts of the COVID-19 pandemic on Loughborough town centre and how to respond. The overwhelming challenge facing the town centre in the run-up to this analysis has, of course, been COVID-19 pandemic.

Specific activities and dates during this period that are expected to have impacted on the footfall pattern in the town centre and are taken in to account in the analysis are:

- 14/09/20 to present: 'Rule of six' introduced, limiting social gatherings to a maximum of 6

- 31/10/20 - 04/11/20: Tier 2 restrictions applied limiting contact indoors to people from the same household, though retail, pubs, restaurants, cafes and leisure facilities remain open

- 04/11/20 - 02/12/20: national lockdown involving closure of pubs, bars, restaurants, cafes and non-essential retail, leisure and entertainment venues though with takeaways and click-and-collect shopping allowed to remain open

- 02/12/20 to 31/12/20: Tier 3 restrictions applied involving the closure of pubs, bars and restaurants, though essential, non-essential shops and leisure facilities remained open

- 31/12/20 to 05/01/21: Tier 4 restrictions applied requiring the closure of all non-essential shops and businesses, including personal care and indoor entertainment.

Understanding the data

In its guide to establishing a footfall baseline as part of COVID-19 recovery planning, the High Street Task Force recognise that counting footfall has become even more important. Footfall counting shows if and how customers are returning to town centres as they reopen and this, in turn, can guide the implementation of necessary interventions and measure their impact.

LOVE Loughborough have been using the GEO-Sense system provided by Proximity Futures since 2014 and so have a wealth of data. This is supplemented by tracking engagement with the accompanying town centre Elephant WiFi.

The GEO-Sense system works by listening for WiFi requests being made from mobile devices and makes a note of them. Each device has its own unique, though anonymous ID that enables sophisticated monitoring individual foot-flow around a town centre as well as footfall at selected points. It provides a relative indicator of footfall, all day every day along with important insights on whether customers are new to the location or not, dwell times, and their journeys around the town centre. The accompanying Elephant WiFi provides additional information including visitor demographics and their hometown.

GEO-Sense monitors are located at seven key town locations across the town centre. This enables comprehensive monitoring of changes in footfall as well as insights into the foot-flow of users across the town centre.

Next steps

This quarterly analysis is provided to LOVE Loughborough to aid its understanding and continued work with businesses and partners to manage COVID-19 recovery and the wider revitalisation of the town centre. LOVE Loughborough BID are supporting analysis on a quarterly basis to help guide the recovery phase of the post-COVID response.

Proximity Futures will continue to support GEO-Sense monitoring and town centre Elephant WiFi including providing monthly summary reports. Access to current data and bespoke reporting is available to LOVE Loughborough and its partners through a dedicated portal.

People & Places are available to comment on all aspects of this analysis or subsequent recovery planning. This includes referencing the national revitalising town centres toolkit that it recently updated for the Local Government Association to take account of COVID-19 recovery planning.