

# UK TOWN CENTRE FOOTFALL INDICES REPORT

JULY 2022



Place Informatics

# SUMMARY

JULY 2022

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## July 2022 Town Centre Footfall Data

It's clear the impact of Covid 19 remains a influence in many of our high streets. Town and city centres focus on footfall figures from 2019 as an important benchmark for the last full trading year. This report provides insight into how well footfall has recovered in town centres across the UK for the month of July 2022 compared to 2019 and how town centre footfall has grown compared to June 2022.

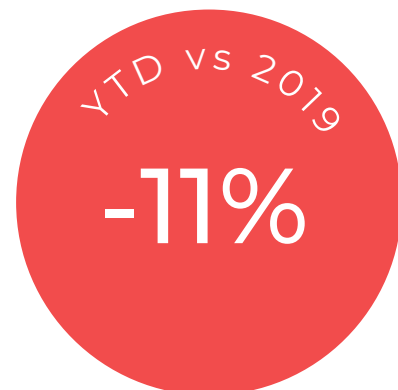
## Current Trends

There has been strong growth in town centre footfall since April 2022 (lockdown rules removed) when compared to 2021. However there was zero monthly growth between June and July, suggesting footfall growth is now stalling. Our August report will provide the first indicators of any impact of the 'cost of living' crisis on town centre footfall and shed light on how many of us spent our summer holidays visiting UK town centres

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**Clive Hall**  
**Visitor Insights Director**  
**Place Informatics**

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# UK FOOTFALL

## JULY 2022 VS 2019



**NATIONAL**  
**- 9%**

| Region                   | % change 22 vs 19 |
|--------------------------|-------------------|
| East Anglia              | -9%               |
| East Midlands            | -8%               |
| London                   | -17%              |
| North East               | -7%               |
| North West               | -9%               |
| Northern Ireland         | -7%               |
| Scotland                 | -7%               |
| South East               | -6%               |
| South West               | -7%               |
| Wales                    | -8%               |
| West Midlands            | -10%              |
| Yorkshire and the Humber | -8%               |

In March 2022 when Covid restrictions started to be removed, footfall in town centres was -11% compared to 2019. May 2022 delivered the strongest recovery against 2019 with decline improving to -8%. Unfortunately footfall growth has since slipped back, with a decline of -9% in July 2022. The weakening in July can be attributed to the extreme heatwave in the third week of the month and a number of train strikes particularly impacting city centre and London locations.

## 2022 vs 2019 by size of town centre

Coastal



Medium



Cities



Small



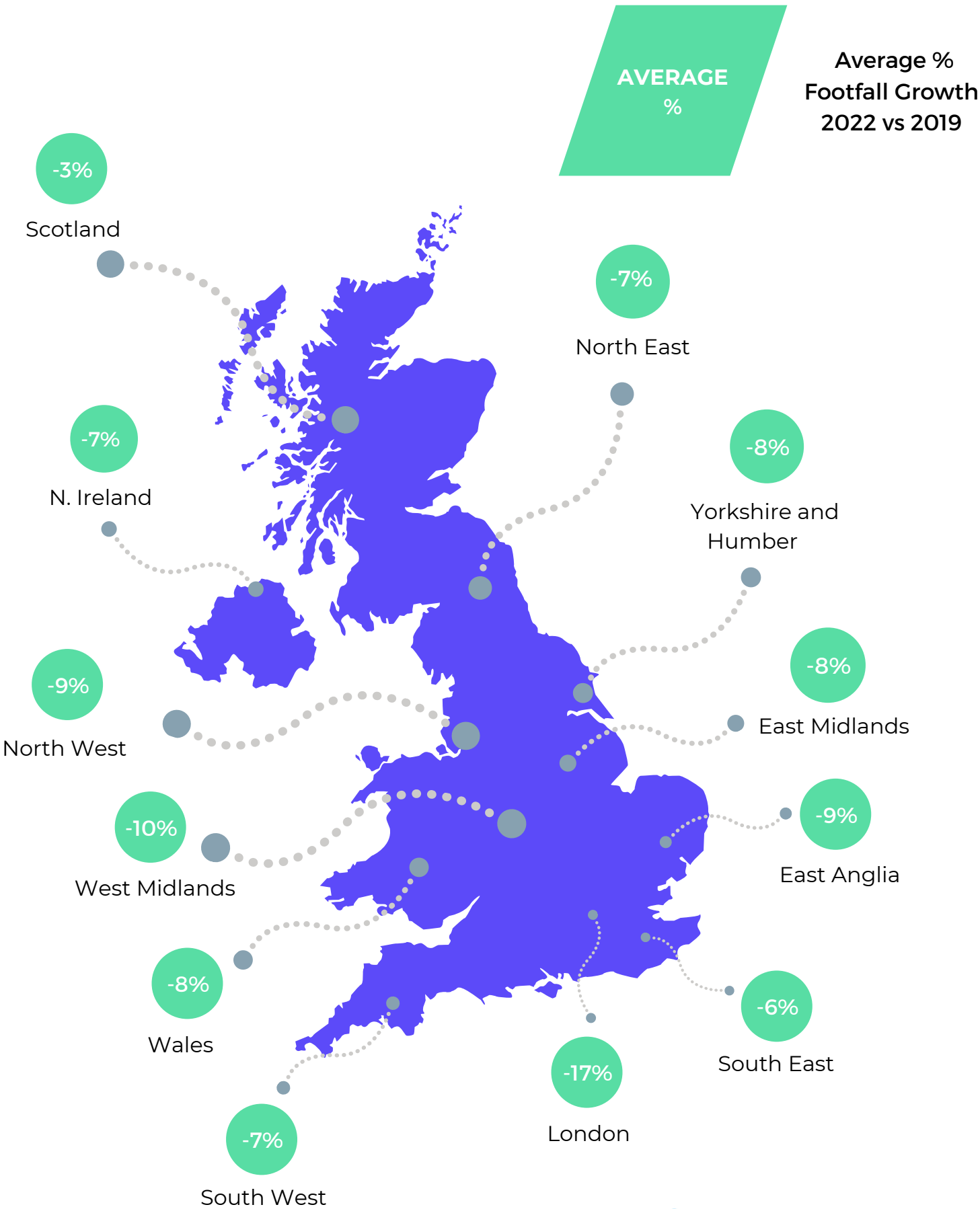
Large



**Town Centre Size**  
**by Catchment Population**

|        |                   |
|--------|-------------------|
| Small  | 200,000           |
| Medium | 201,000 - 500,000 |
| Large  | 401,000 - 900,000 |
| Cities | 900,000 +         |

# REGIONAL TOWN CENTRE FOOTFALL GROWTH JULY 2022 VS 2019



# UK RECOVERY

## JUNE VS JULY 2022 (MONTH ON MONTH)

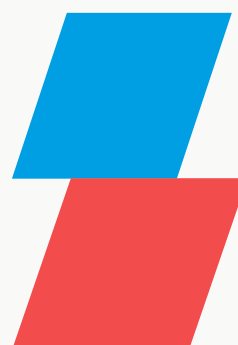
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Footfall growth between June 2022 and July 2022 for UK Town and City Centres (2,300+ locations) was 0.7%. As there are only 30 days in June compared to July's 31 days, this is actually a real term decline of -2.6%.

However when analysing the data by size of town centre, the monthly growth change is not uniform. Small town centres (catchment less than 200k) recorded the strongest growth of 2.8%, perhaps due to the continued homeworking trend, however this still falls short of the 3.3+% growth required for no decline, when taking into account the 31 days in July vs 30 days in June.

City centre growth saw the highest level of decline, recording a -0.3% decline in footfall June to July, being adversely impacted by bank holidays and railway strikes.

In addition, all town centres were negatively impacted by the heatwave experienced during July 2022.



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# UK FOOTFALL JULY 2022 VS 2021

**NATIONAL**  
**+55.4%**

| Region                   | % Change 22 vs 21 |
|--------------------------|-------------------|
| East Anglia              | +60%              |
| East Midlands            | +48%              |
| London                   | +51%              |
| North East               | +52%              |
| North West               | +43%              |
| Northern Ireland         | +69%              |
| Scotland                 | +66%              |
| South East               | +53%              |
| South West               | +63%              |
| Wales                    | +70%              |
| West Midlands            | +41%              |
| Yorkshire and the Humber | +49%              |

## July 2022 vs 2021 By Size Of Town Centre

**Small**  
**+49%**

**Medium**  
**+41%**

**Large**  
**+45%**

**Cities**  
**73%**

**Coastal**  
**+82%**

### Town Centre Size By Catchment Population

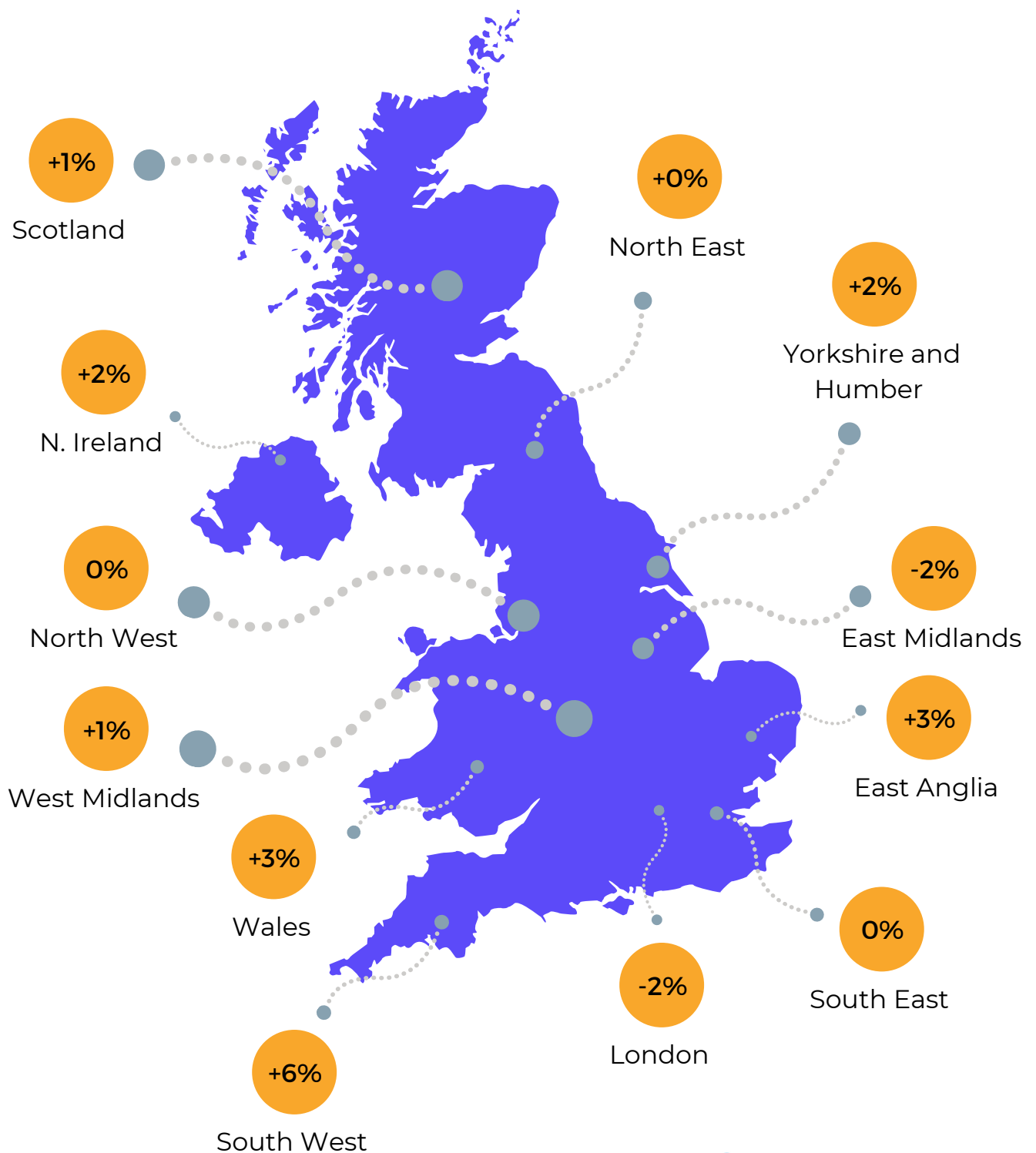
|        |                   |
|--------|-------------------|
| Small  | 200,000           |
| Medium | 201,000 - 500,000 |
| Large  | 401,000 - 900,000 |
| Cities | 900,000 +         |

# REGIONAL RECOVERY

## JUNE VS JULY 2022 (MONTH ON MONTH)

Key:

**MOM  
JUNE VS  
JULY 2022**



# 2022 TOWN AND CITY CENTRE PERFORMANCE REVIEW

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Place Informatics uses mobility location data to calculate visitor behaviour patterns for over 2,300 town and city centres across the UK. Location data includes footfall, visitor demographics, catchment and movement flows for all town centre locations.

We are happy to update you on how your town or city centre has been performing during 2022.

To book your FREE 2022 town centre performance review (30 minute Zoom meeting) please use the link: <https://calendly.com/clive-hall/diary-booking>

Or email Clive Hall directly: [clive.hall@placeinformatics.com](mailto:clive.hall@placeinformatics.com)

## Number of Town and City Centres Analysed

| Top Each Region          | Town and City Centres |
|--------------------------|-----------------------|
| East Anglia              | 179                   |
| East Midlands            | 158                   |
| London                   | 333                   |
| North East               | 86                    |
| North West               | 297                   |
| Northern Ireland         | 45                    |
| Scotland                 | 197                   |
| South East               | 315                   |
| South West               | 222                   |
| Wales                    | 126                   |
| West Midlands            | 161                   |
| Yorkshire and the Humber | 205                   |
| Total                    | 2324                  |