St Albans Footfall & Dwell Report

Topline comment: There is no evidence that the current trial has negatively impacted footfall or dwell time. Footfall levels have increased by 2.6% in comparison to pre-trial conditions. As there are so many factors that influence footfall, it is not possible to attribute this increase to the scheme.

1. HUQ Data

1.1. HUQ monitors footfall visits and dwell time from mobile location data. Available data goes back to 2 January 2019.

2. Footfall Over Time

2.1. Chart 1 shows continuous linear progression of footfall in St Albans from January 2019 to December 2023. There is a drop in the runup to the Covid pandemic and subsequently footfall has not recovered to 2019 levels. There are slight upturns after lockdown and for Eat Out to Help Out and more recently in autumn to Christmas 2022.

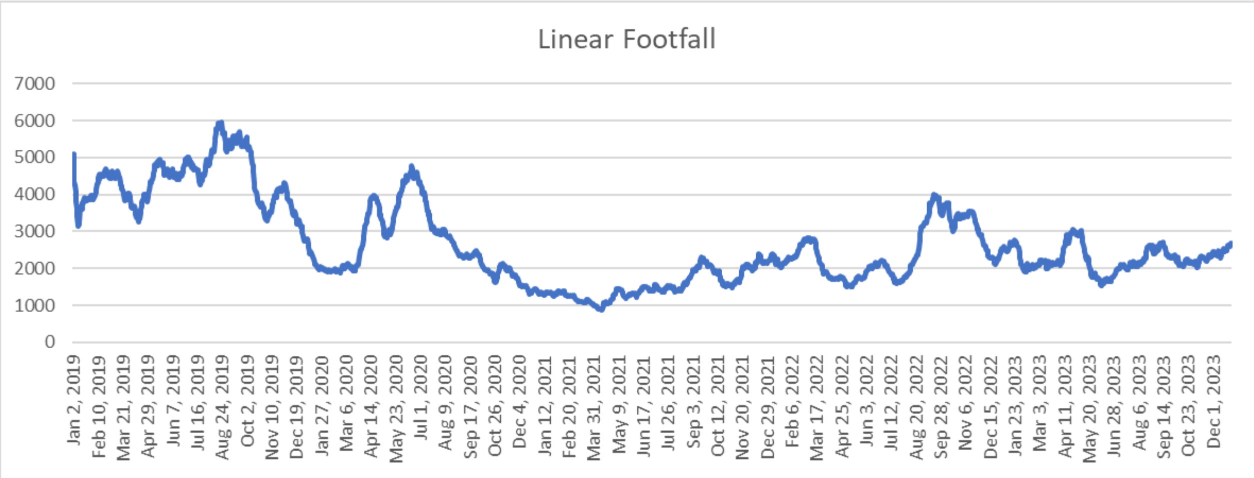

Chart 1 – Linear Footfall in St Albans (2019 to 2023)

2.2. Chart 2 shows the same data but presented year-by-year. The only points where 2019 footfall figures (dark blue line) have been exceeded are during April and June 2020 and November 2022. 2023 footfall tracked close to 2022 levels apart from during April/early May 2023 which experienced roughly double April 2022 footfall. However, there was not the equivalent boost experienced in Autumn 2022 – footfall remained supressed in the equivalent period in 2023.

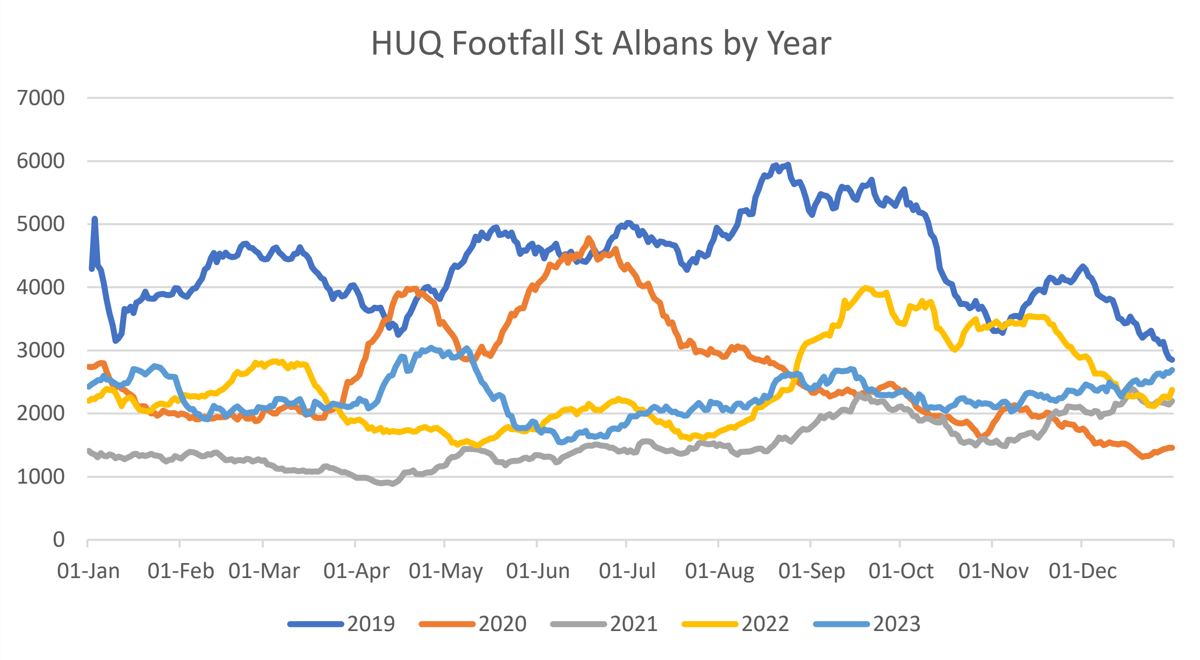

Chart 2 – Footfall in St Albans by year (2019 to July 2023)

2.3. Chart 3 tracks total recorded footfall by year. Footfall has not recovered to 2019 levels and recovery is inconsistent. While it is important to consider the wider economic picture, it is still fair to say that recovery has not been as successful or sustained as for some other locations. Total footfall is currently just over half of that for 2019.

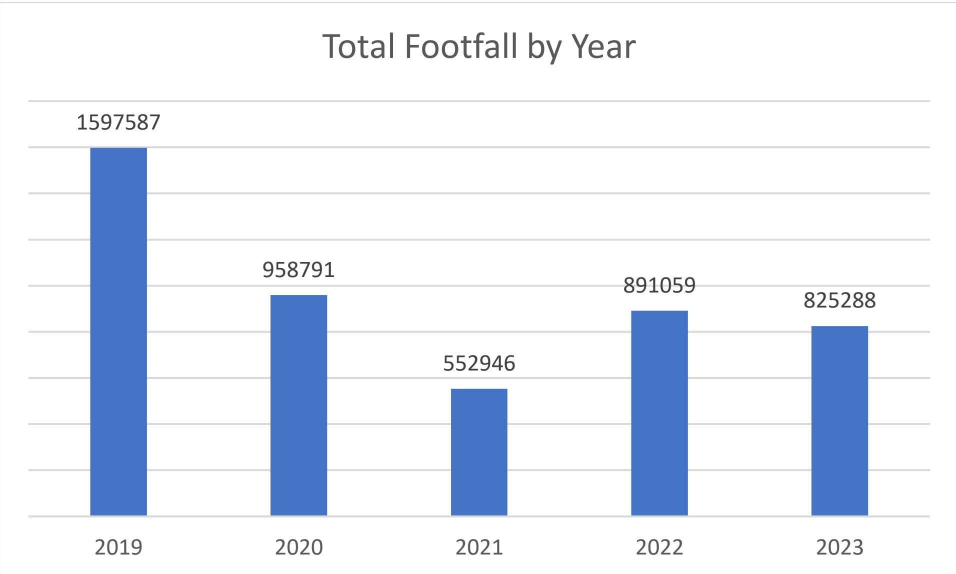

Chart 3 – Total Footfall in St Albans by year (2019 to July 2023)

3. Footfall Monitoring & Evaluation

3.1. It is possible to compare and quantify pre-trial and during trial periods.

3.2. Assessment areas:

- St Albans City centre
- Baldock town centre (control site)

- Potters Bar High Street (control site)

3.3. Assessment periods:
- Nov 2021 to Oct 2022 (before scheme trial)
- Nov 2022 to Oct 2023 (during scheme trial)

3.4. Monitoring Question: To support retail and hospitality businesses in St Albans City Centre by creating an environment that encourages more people to visit.

3.5. Summary

3.6. Compared to pre-Phase 2 trial conditions, footfall levels in St Albans have seen a 2.6% increase during the scheme trial (see Table 1). However, this remains 20.5% suppressed in comparison with the data for November 2019 and October 2020 (which encompasses pre-pandemic and pandemic conditions).There is no clear month-to-month pattern though, for example straight after Phase 3 was introduced in November 2022, footfall was 88.5% higher than the equivalent month the year before, yet in October 2023 the figure was 36.4% lower than the equivalent period the year before (October 2022). St Albans footfall appears cyclical (see Chart 1 and Chart 2). Factors including cost of living, the economy and the weather are likely to be far more influential in determining footfall than the High Street Recovery project in St Albans. Spaces were not activated to their full potential during the trial, events did not make best use of the available space, additional events were not organised and traders were limited in being able to use the space. The High Street Recovery programme cannot claim any benefit for generating the 2.6% increase in total like-for-like footfall, though it may have contributed in some minor way as part of a mix of many factors. The control towns of Baldock (-5.3%) and Potters Bar (-11%) experienced reductions in footfall over the same period. There is no evidence that the High Street Recovery trials suppressed footfall in St Albans in any way.

Row Labels	**Nov 2021 - Oct 2022**	**Nov 2022 - Oct 2023**	**%**
November	1777	3350	88.5%
December	2139	2413	12.8%
January	2198	2578	17.3%
February	2459	2049	16.7%
March	2470	2134	13.6%
April	1758	2639	50.1%
May	1639	2383	45.4%
June	2050	1680	18.0%
July	1819	2045	12.4%
August	2205	2320	5.2%
September	3618	2478	31.5%
October	3421	2177	36.4%
Grand Total	**2295**	**2354**	2.6%

Table 1: Pre- and during Phase 2 High Street Recovery Trial Footfall, St Albans daily averages

3.7. As previously noted, footfall in St Albans has not recovered to pre-Covid levels, but this has not been the case for the control sites, which have seen more consistent footfall throughout (see Chart 4). At points since the start of 2021, footfall in St Albans has on occasion dipped below that of the control towns. This has not been the case since the summer of 2023.

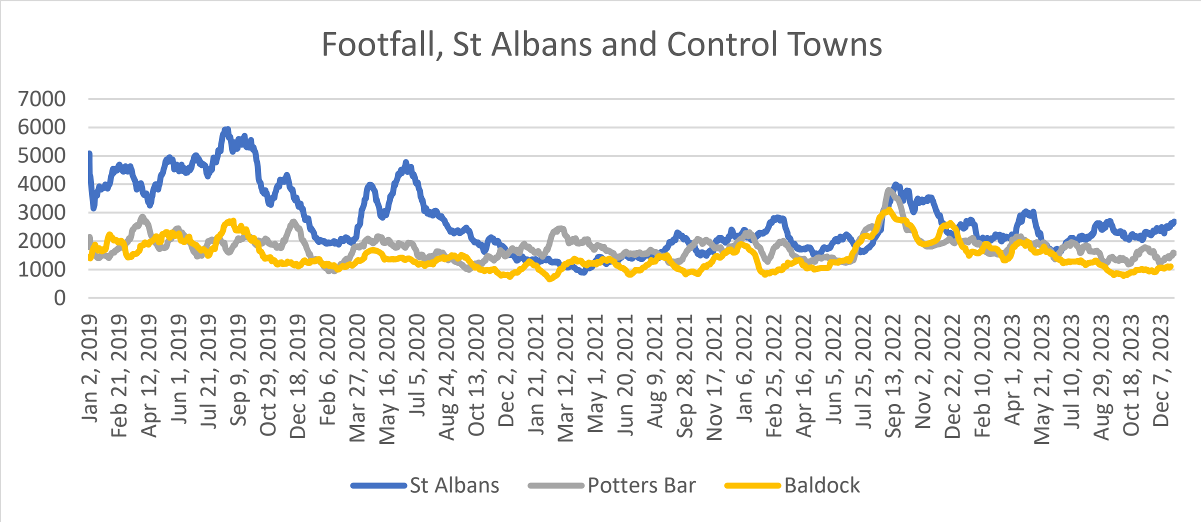

Chart 4: Footfall Comparison: St Albans and Control Towns

4. Footfall Through the Day

4.1. In order to better understand the effects of the trial measures, a small analysis is carried out to look at footfall patterns through the day in this report.

4.2. Charts 5a shows footfall patterns through the day before the trial measures and Chart 5b shows the same for during the trial measures. Morning and afternoon peaks have been replaced by a more noticeable single peak during the middle of the day.

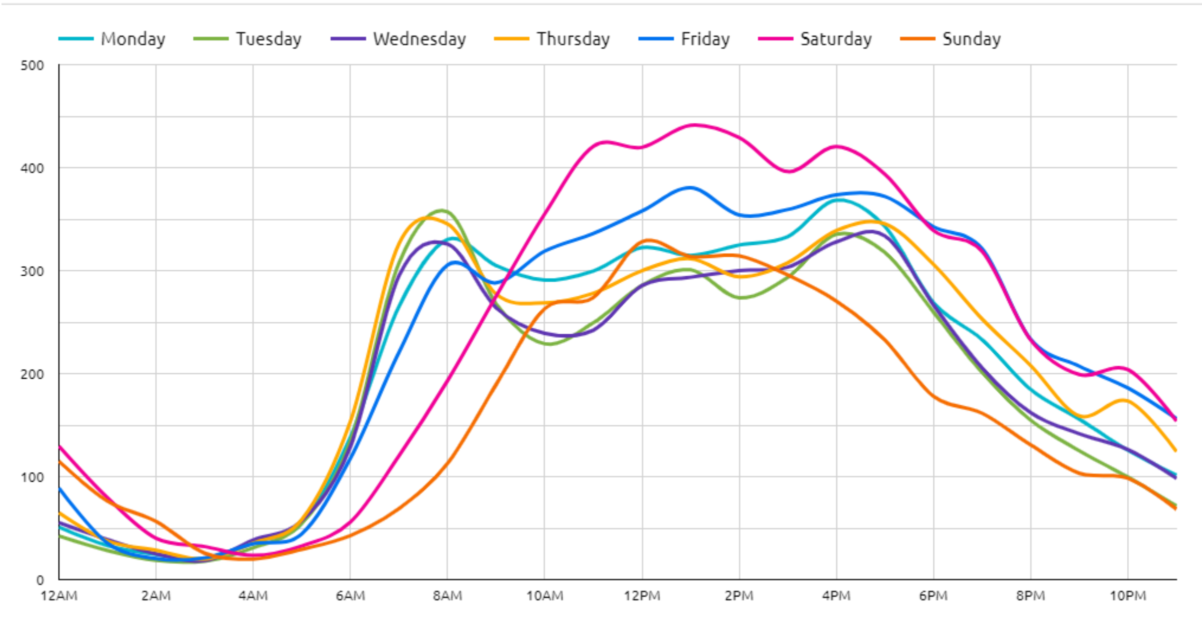

Chart 5a – Footfall patterns through the day (November 21 to October 22)

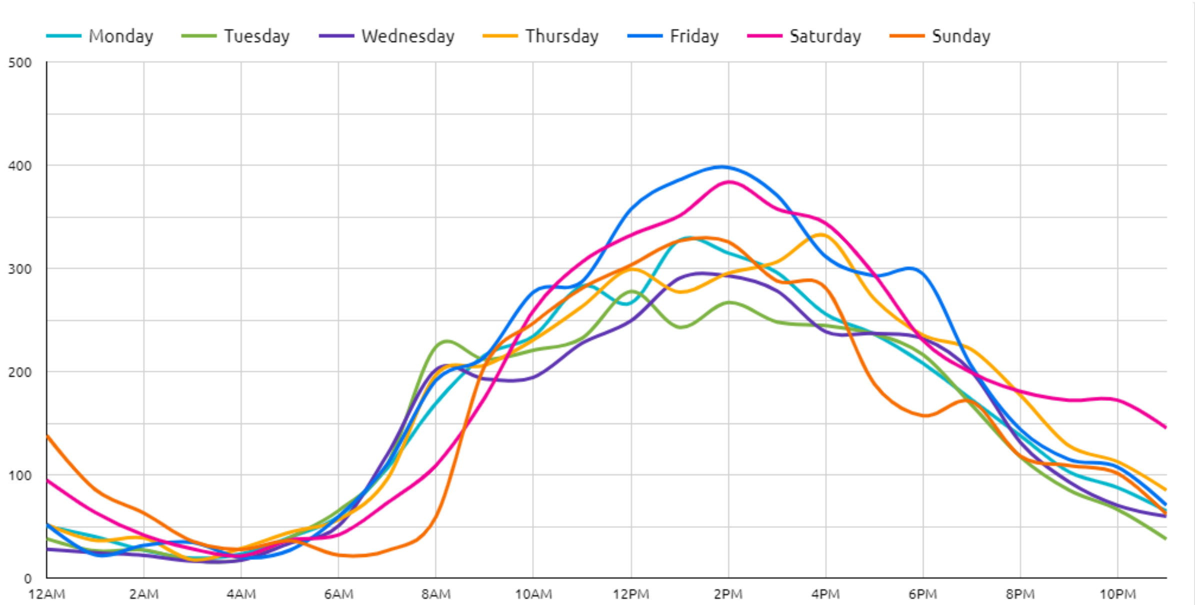

Chart 5b – Footfall patterns through the day (November 22 to July 23)

4.3. Looking at more depth from Friday night to Sunday when the High Street gates were closed, footfall through most of the day is lower than in pre-trial conditions (Chart 6a-c). There is no evidence of the trial boosting nighttime footfall from Friday or Saturday evening. It should be concluded that footfall increases were experienced principally in midweek when comparing pre-trial to trial conditions.

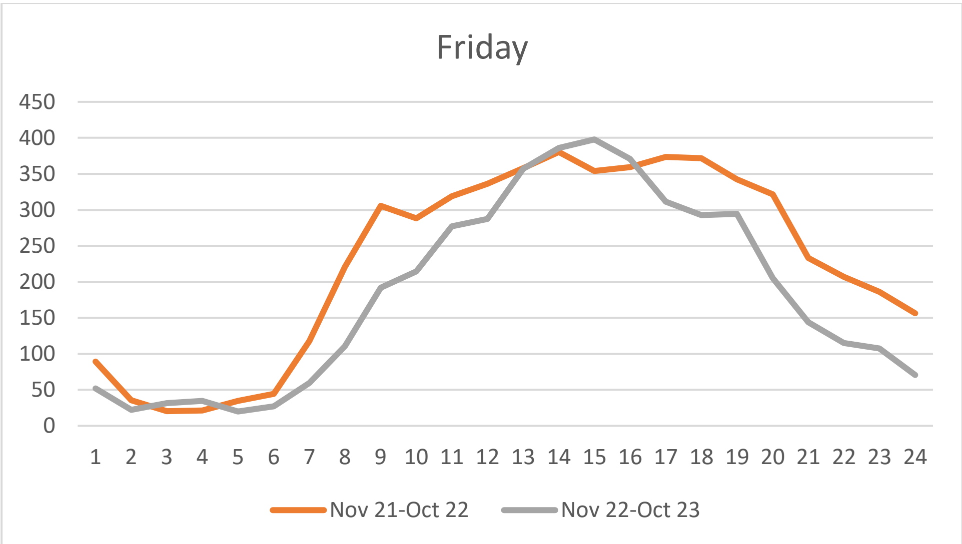

Chart 6a – Footfall patterns on Fridays

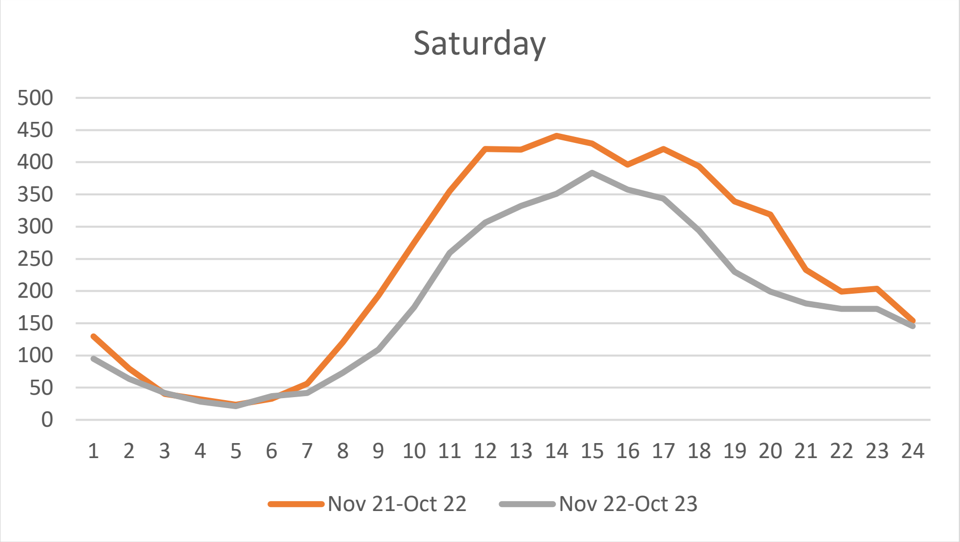

Chart 6b – Footfall patterns on Saturdays

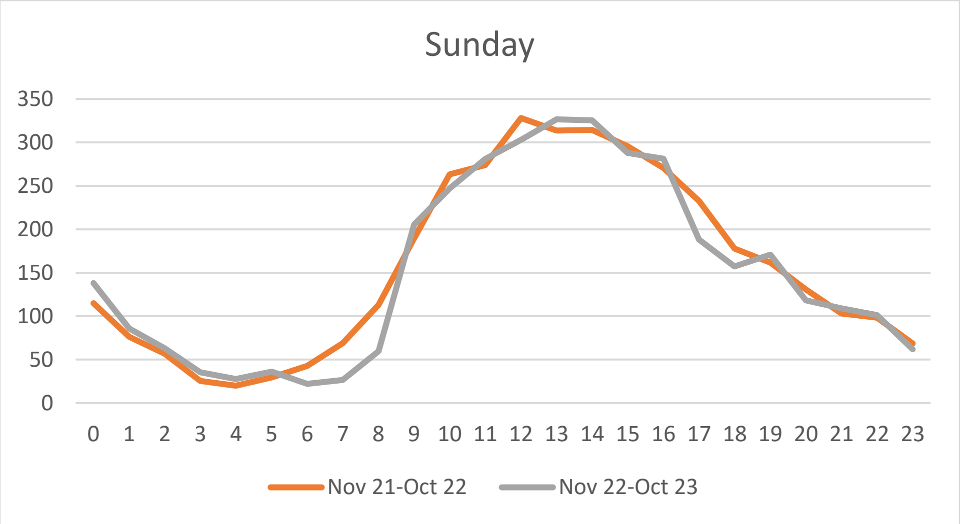

Chart 6c – Footfall patterns on Sundays

5. Dwell Time

5.1. While people are not staying as long as they were in 2019, dwell time has been slowly and unspectacularly recovering since 2021 for most days of the week (Chart 7). In 2019, people spent on average 166.4 minutes in St Albans. By 2021 the figure had fallen to 130.9. This increased to 135.7 in 2022 and 137.3 in 2023.

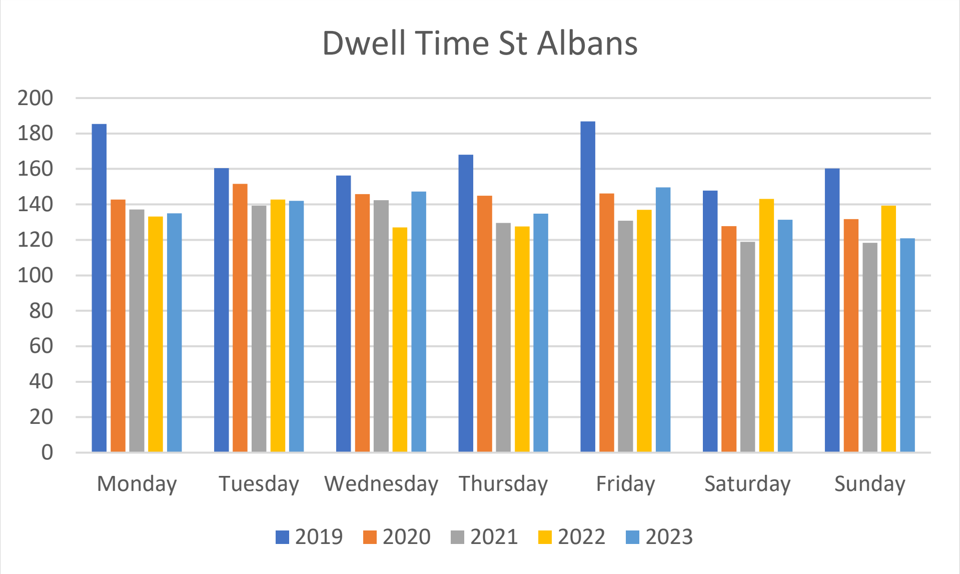

Chart 7 – Dwell Time at St Albans

6. Dwell Monitoring & Evaluation

6.1. It is possible to compare and quantify pre-trial and during trial periods.

6.2. Assessment areas:

- St Albans city centre
- Baldock town centre (control site)
- Potters Bar High Street (control site)

6.3. Assessment periods:

- Nov 2021 to Oct 2022 (before scheme trial)
- Nov 2022 to Oct 2023 (during scheme trial)

6.4. Monitoring Question: To support retail and hospitality businesses in St Albans City Centre by creating an environment that encourages more people to visit.

6.5. Summary

6.6. There has been a barely perceptible increase of 0.1% in dwell times when comparing pre-trial and during-trial conditions. It should be noted that this remains an 8% decrease in dwell time in comparison with November 2019 to October 2020, which encompasses pre- and during-Covid pandemic time periods. While Fridays have experienced a noticeable 12.5% boost in dwell time, Saturdays (-1%) and Sundays (-12.7%) have experienced a decline (Chart 8). While arguably the High Street Recovery trial could influence footfall negatively (i.e. the decision on whether to come into the city or not based on a perception of traffic disruption potentially caused by the trial) it is hard to see how it might have influenced dwell time negatively at the weekend when the High Street was closed. While the lack of activation would have potentially suppressed any increase in dwell time over previous years, it is more likely that (as with footfall) there are other, more influential factors over whether people stay longer or not. This includes parking strategies, lifestyle choices, train and bus timetables and economic circumstances. These factors are likely to be more influential in dwell times, and it should also be noted that town centres that are more welcoming to walking and cycling, are able to attract more people travelling actively into their centres often improve dwell times as these people do not have to rush back because their parking time is running out or their train or bus is due. It is thought factors other than the High Street Recovery trial are more influential in determining dwell times when there has been a lack of significant activation. Therefore, the High Street Recovery trial is not able to take credit for the very minor increase in dwell time in comparison with pre-trial conditions or the increase in dwell times on a Friday. Nor is it likely to be responsible for decreases in dwell times at the weekend, when High Street was closed to traffic.

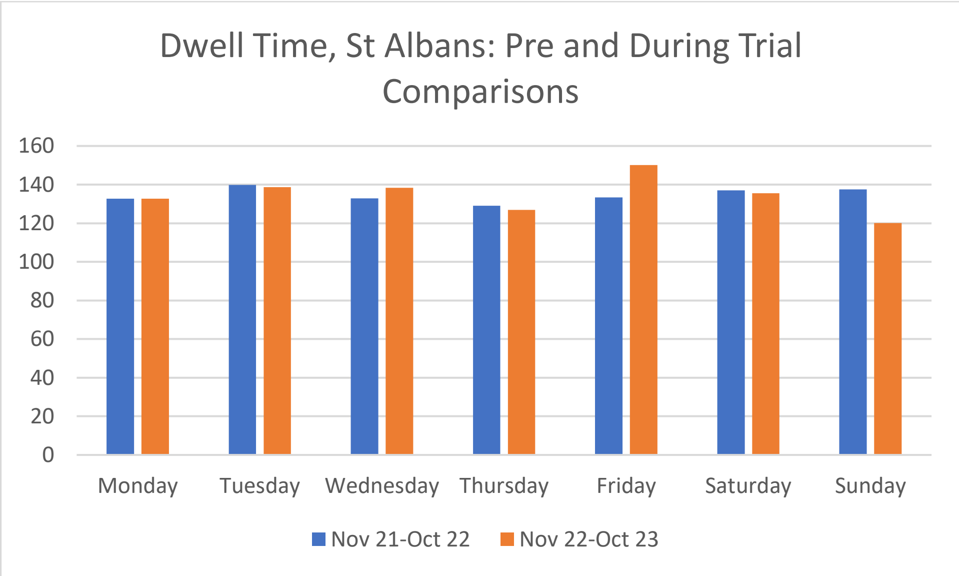

Chart 8 – Comparison of dwell time pre- and during trial

6.7. Whereas St Albans dwell time averages have been static when comparing before and during the trial, Baldock has seen an increase of 9.7% and Potters Bar has seen a decrease of -4.3% during the same comparative periods.

7. Commentary & Conclusions

7.1. It is hard to attribute any improvement or decline in footfall and dwell time to the High Street Recovery trials. There are many factors that influence whether people come into the city centre and how long they stay. Congestion or perception of congestion is just one of those; as is whether an event is happening and whether the destination is a safe and pleasant place to spend time. Some respondents to the public survey commented that they (and people they knew) no longer went into St Albans because of the trials and congestion they have supposedly caused. There is no evidence that the current trial has negatively impacted footfall or dwell time. Other factors, such as innovation by retail and hospitality outlets and range of events might encourage footfall and increase the amount of time people stay in the area. Public space, benches and a pleasant environment can add ‘stickiness’ to a place; traffic-heavy spaces and a need to get back to a car parked in a free time-limited space can reduce the time people spend somewhere. Similarly, weather or economic circumstances might also influence decisions.

7.2. We will continue to do more analysis on footfall and dwell times, including comparisons with other towns in Hertfordshire. The Phase 3 measures have been in place since 6 November 2023. Together with the measures implemented in the first two phases, we hope to understand trends in St Albans in a better way while collecting more data. There have been increases in footfall and dwell times since 2021. More time will allow us to see if this trend continues upwards.