Coventry City Centre Footfall Quarterly Report: Q3 2024

Footfall during July – September 2024

Insight
13/12/2024

Contents

Executive summary

The number of daily visitors to Coventry city centre was reduced during quarter 3 2024, notably down on the year before. However, the average dwell time of those who visited was up year-on-year, so the city centre would have felt as busy overall.

- **Visitors:** The total number of visitors to Coventry city centre during July-September 2024 was notably down year-on-year, 16.5% lower than during July-September 2023.
    - For 2024 overall up to now, visits are 6.0% down year-on-year.

    - Footfall remains significantly lower than pre-pandemic levels.
    - Recent trends compare unfavourably to Leicester city centre.
    - The reduction was driven by a fall amongst higher income people.
    - Visits are highest on Fridays and Saturdays and fell year-on-year in Q3 2024 most on Mondays and Tuesdays.
- **Dwell:** However, overall visitors spent more time in the city centre in Q3 2024 than the year before, average dwell time was up. This means that the city centre would not have felt less busy despite the total number of visitors falling.
    - There was a significant drop in visits from people who generally spend less time in the city centre, a driver in the fall in *average* dwell time.
    - There are other trends behind increasing dwell, including an overall increase in visitors dwelling in the city for relatively long periods.
- **Hours:** Recent trends show a reduced number of visits in the morning and an increased share in the afternoon and evening.
- **Busy areas:** There has been some change in which areas of Coventry city centre are busiest.
    - The details can be seen in the maps in the report below. While insightful, it is not clear if the changes are indicative of specific patterns of changing city centre use.
- **Origins:** Between Q3 2023 and Q3 2024, while totals visits reduced, an increased proportion of visitors were from local areas, from Coventry and Warwickshire.
    - This means that, the fall in total visitors was driven by a significant fall in visitors from further afield. Although the total number of visitors from Coventry also fell slightly.

Throughout the report, we have sought to try and understand the reasons for these trends outlined above and understand what is happening and what it means. Firstly, we have to be aware of the time of year this data is looking at, July to September 2024, mostly summer that includes school holidays, and university students are on summer break for most of this time. As such, while university students will usually be an important consideration in city centre use, the Coventry University campus being based in the city centre, the Q3 dynamics explored in this report will be less affected by students. However, the fact that in 2024 the Coventry University term started on 16th September, a week later than the year before (11/09/2023) may have a small effect of reducing Q3 footfall in 2024 compared to the year before.

The facts that the reduction in visits was greatest on weekdays, was driven by a reduction in visits from higher income people and by a reduction in visitors from outside Coventry and Warwickshire, may indicate that a key trend in the overall fall in visits was reducing commuters to work in the city centre, perhaps office workers - related to working from home patterns. Commuters may spend less time in the city centre per visit on average, so the significant reduction in the numbers of visitors with short dwell time could be explained by a reduction in commuters.

A fall in visits from high income visitors and visitors from further afield may also partly indicate a reduction in tourism between 2023 and 2024, although this may not be a significant trend in the overall picture.

The weekday and the 'daypart' data, alongside the increase in dwell time, may indicate an increase in leisure and evening use of the city centre (or that it remained stable relative to reductions in other types of use), perhaps from more local, perhaps from people in lower purchasing power groups.

The data does not indicate that the upcoming City Centre South (CCS) development, whereby a section of the city centre is being prepared for demolition and redevelopment and shops have been closing, has been a key factor in the trend of reducing visitors. The area is generally not shown to be amongst the busier areas in either 2023 or 2024. Also, the reduction is driven by falling numbers of high purchasing power visitors, and we might think that the CCS area was more commonly used by lower income people.

Introduction

This report presents analysis of measures of footfall in Coventry city centre for quarter 3 (Q3) 2024, the period July – September 2024. The headline measure presented is the estimated number of visitors to the city centre and how this changes over time, with a focus on the ‘year-on-year’ change, the difference between Q3 2024 and Q3 2023. As footfall can be seasonal it is important to compare equivalent periods of time. Headline data is available to us for one other city centre, Leicester – we present this data to provide a benchmark against which we can compare Coventry trends.

The estimated number of visitors is a measure of the volume of people visiting Coventry city centre by foot. The data is sourced from the ’Signals’ platform provided to us by external company Huq Industries. This system estimates the number of unique daily visitors, each person is only counted once per day; it is therefore not a measure of ‘busyness’. When we aggregate this daily headline number over time periods: weeks, months, quarters, years – then the aggregate ‘footfall’ estimate will then, of course, not be a count of unique individuals because many people will visit the city on more than one day during such periods.

The data is an estimate of the number of people who entered the Coventry city centre area (see maps in the section below ‘busiest parts of Coventry city centre’) from outside the area (so this will not include people who live in the city centre) and spent a reasonable amount of time there i.e. they were not just travelling through in a car. It makes the estimate by using data Huq Industries has on the usage of a number of mobile phone apps, using anonymised location data taken from the app to identify whether people have visited Coventry city centre on a particular day. It has data for a sample of mobile phone users, not all; they have selected the apps to ensure the sample of people is wide and representative enough to extrapolate to make robust estimates. However, as it is based on a sample, the daily visit figures are *estimates*, they are subject to a margin of error. As such we do not take conclusions from single daily figures, data is aggregated over months and quarters which allows us to be confident that they are generally representative of real trends.

This is the direct link to Coventry city centre footfall data platform Signals: https://signals.huq.io/. All Coventry City Council employees are able to use Signals, contact Insight for access.

As well as the headline visitors measure, here we analyse the additional data available to us in Signals: visitors by day and purchasing power, the dwell time of visitors, the busiest areas of the city centre (‘density’) and which parts of the city and country visitors come from (‘granular catchment’).

This report is designed to give a more detailed picture of the data from Signals than is presented in monthly headline reports. Footfall data for October and November 2024 has recently become available and presented in the monthly reports published here. This report gives insight from data up to the end of September 2024; the data from the more recent headline reports can be used to add to the picture given from the findings from this report. While this report gives a general picture of reducing footfall up to September 2024, total footfall levels improved in October 2024 and November 2024.

Headline figures

Measure - footfall total for Q3 2024	Coventry city centre		Leicester city centre
Quarter-on-quarter (% change compared to previous quarter)	+2.6%	↑	+15.1%
Year-on-year (% change compared to same quarter last year)	-16.5%	↓	-3.8%
Year-to-date (% change - total 2024 footfall up to end of this quarter compared to same period last year)	-6.0%	↓	+12.1%
Compared to pre-pandemic (% change compared to same quarter in 2019)	-28.0%	↓	-13.5%

The total number of daily visitors to Coventry city centre in quarter 3 (Q3) 2024, across every day during July to September, was 2.6% higher than it was in the previous quarter (April to June). This trend is not a good as it was in Leicester city centre, where footfall increased by 15.1% quarter on quarter.

While footfall was up quarter on quarter, the overall picture for Q3 shown by the headline figures in the table above and also the table below is of a flat or downward trend for Coventry city centre footfall that doesn't compare well with Leicester city centre. The total number of visits was 16.5% lower than it was during the same time the previous year, Q3 2023; while this is also the case for Leicester, the drop was much less in scale there. Visits are down for the year to date, total visits for the first three quarters of 2024 are 6.0% lower than in 2023, whereas in Leicester 2024 is actually up 12.1% on 2023 up to the end of September.

Coventry city centre footfall remains significantly below levels seen before the COVID-19 pandemic. Q3 2024 total visits were 28.0% lower than in Q3 2019. While it is also down in Leicester city centre, not by as much, only 13.5% lower; in the period since the pandemic overall Leicester city centre footfall has recovered better.

Total Coventry city centre footfall (aggregated daily visitors) & average and peak daily visitors

	Total visitors in period	Average daily visitors in period	Peak daily visitors in period
Quarterly			
Q3 2024	5,736,214	62,350	122,363
Q3 2023	6,866,793	74,639	129,539
Year-to-date			
Q1-Q3 2024	16,209,935	59,160	132,722
Q1-Q3 2023	17,240,089	63,151	129,539

This table shows the aggregated total Coventry city centre visitors during Q3 2024 compared to same period last year and for the year to date in 2024 compared to 2023, as well as the daily average number of unique visitors for these periods, and the maximum daily number during these periods.

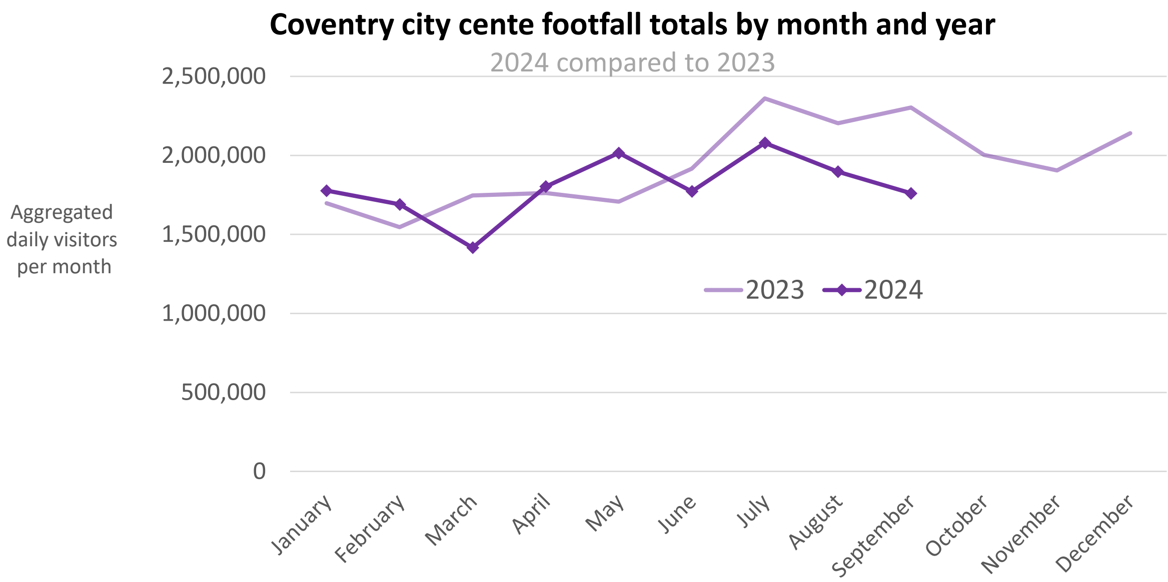
The 'total' figures presented in the table above are not the total number of unique visitors by week or quarter or year, the unique visitors per day are aggregated for these periods, many visitors will visit Coventry city centre for more than one day during these periods so will be counted more than once.

The average daily figures give us an idea of daily volume of visitors, averaging 26, 350 in Q3 2024, down from an average of 72,639 in Q3 2023.   The peak daily figures show that daily footfall can fluctuate notably; the highest the daily visitors reached in Q3 2024 was 122,363 (on Saturday 20th July 2024) slightly lower than the peak for the same period in 2023.

It should be noted that these aggregated daily visitor figures are not the full picture of footfall, the amount of time each visitor spends in the city centre in a day also contributes to footfall – the 'busyness' of the city centre. The 'dwell' figures presented below gives a fuller picture and should be considered in conjunction with the visitor figures – they show that increased average dwell time of visitors has mitigated the impact of downward trends in visitors recently.

Trends

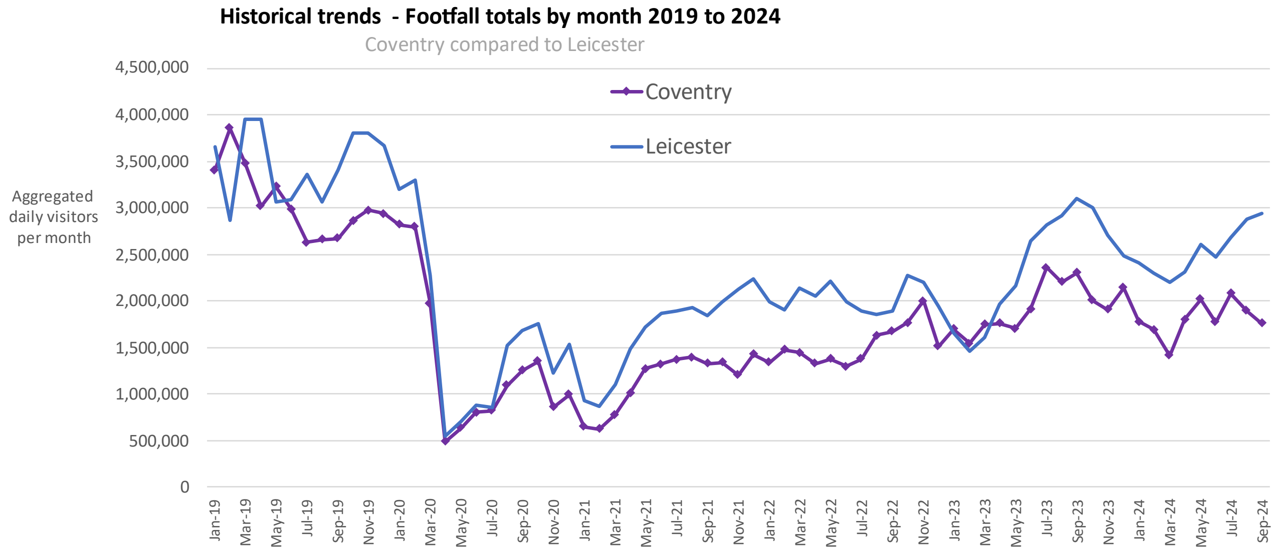
The latest data can be seen on dashboards at the Facts about Coventry pages on Coventry City Council's website, direct link: https://www.coventry.gov.uk/facts-coventry/economy-business/4



The chart shows the trend in monthly city centre total visits for 2024, compared to the same period in 2023. Seasonal trends affect footfall, and when comparing monthly totals between 2024 and 2023, the trend fluctuates with some months in 2024 higher than the previous year, and others lower.

Footfall was falling during winter at the beginning of 2024, continuing a falling trend since the summer of 2023, reaching a low in March 2024. Total monthly visitors have increased since Q1 2024 but fluctuated and the chart shows that the most recent figures during Q3 2024 are notably lower the same season in 2023. Up to the summer of 2023 a gradual increasing trend of recovery since the COVID-19 pandemic had continued, but since then overall visitor levels have fallen and fluctuated at a lower level. This is the trend that has led to Q3 2024 visits being notably lower than in Q3 2023.

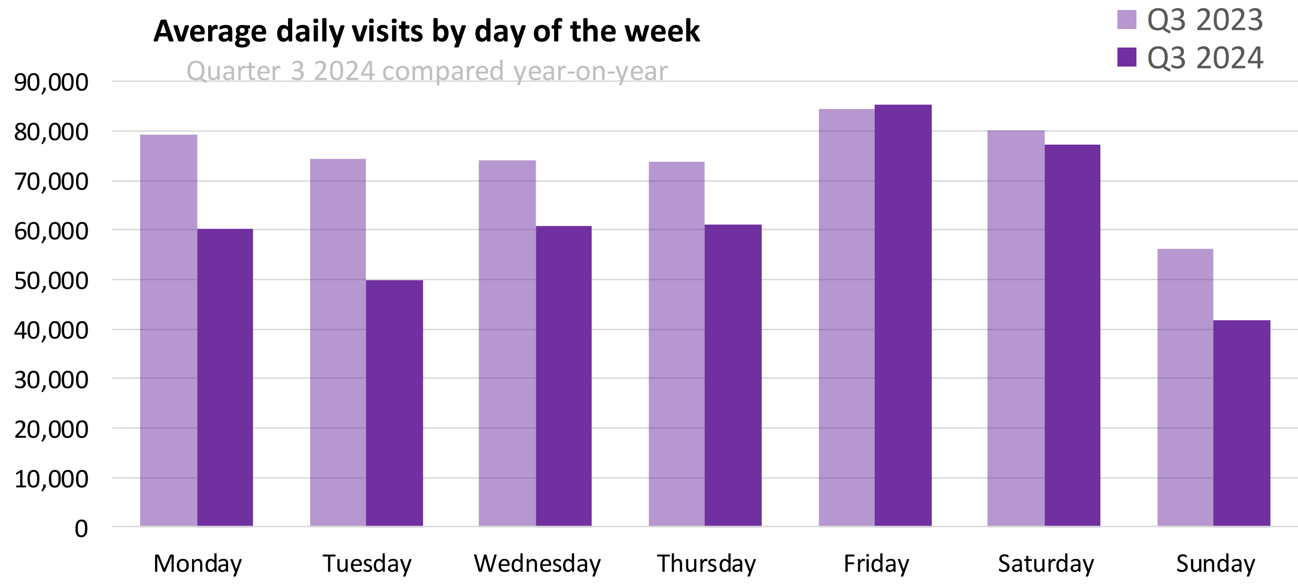
Monthly footfall trends in Coventry city centre and Leicester city centre



The chart above shows footfall trends back to January 2019, the earliest period this data is available for, and compares Coventry city centre to Leicester city centre. It shows broadly similar trends for Coventry and Leicester, a dramatic reduction in footfall upon the first COVID-19 lockdown and very gradual recovery since then as restrictions eased. It clearly shows that this recovery has not brought city centre visitor levels back to those seen before the pandemic. Trends in usage of city centres, and other things like working from home patterns, have changed since 2019, impacting on footfall.

Comparing Coventry city centre and Leicester city centre, we can see that for much of 2019 Coventry saw lower visits than Leicester, and this remains the case in 2024. However, better recovery in Leicester has meant that the gap between Leicester and Coventry is now wider. Care should be taken making conclusions from the total numbers when comparing volume, differences could be due to the data for one of the city centres being based on a larger area than the other, the comparative sizes of areas measured for the two centres are not known.

Visitors by day of the week



The chart above shows the average daily visit figures for Coventry city centre for each day of the week during Q3 2024 compared to Q3 2023. It shows that, for both this year and last, footfall is highest on Fridays and Saturday, likely reflecting more leisure and evening visitors than other days. The chart gives more details that might explain how and why total visits was down in Q3 2024 compared to the same period last year. It shows that visits were down in 2024 particularly on weekdays Monday to Thursday, by most on Tuesdays, with little change in the average volume of visits for Friday and Saturdays. This may indicate that the reduction in total visits between Q3 2024 and Q3 2023 could be due to a reduction in workers using the city centre in 2024, it may be that office workers were more likely to work from home. This data may also indicate the evening and leisure footfall has been relatively stable, staying the same between 2023 and 2024, or maybe even increasing.

The section below showing data in dwell time includes further insight into trends by day of the week.

Trends by purchasing power

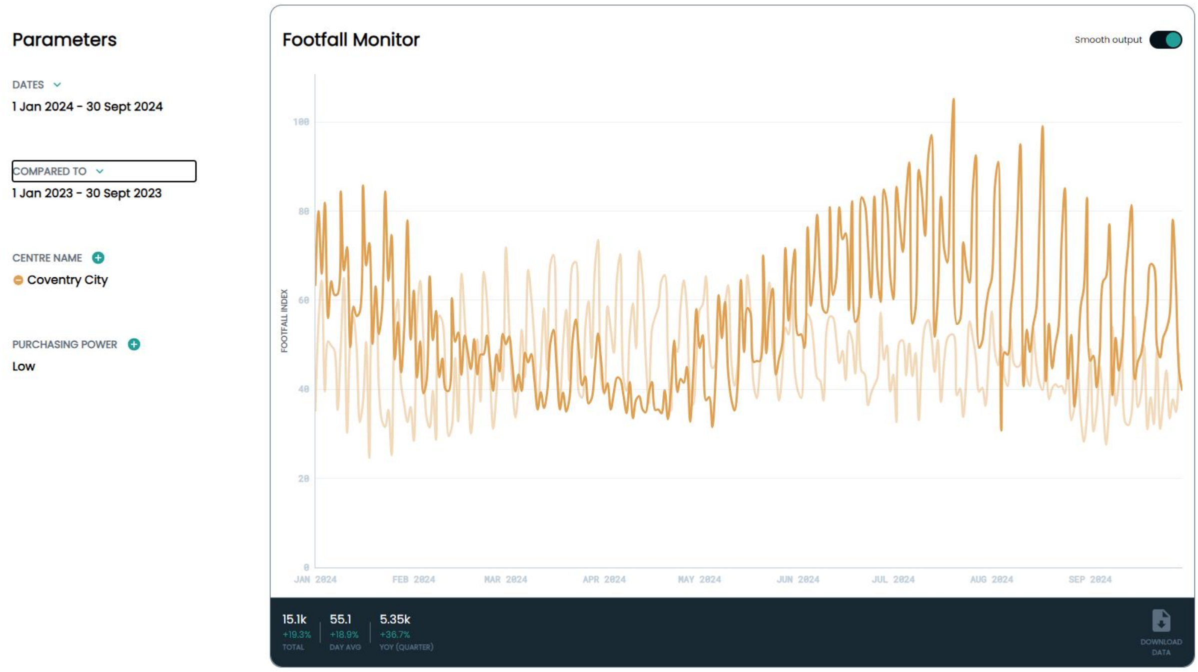
The Signals data provides estimates of the number of visitors segmented into groups by purchasing power. It shows that, compared to the West Midlands regional and national averages, people visiting Coventry city centre are more likely to be from lower income groups; overall a higher proportion of visitors to Coventry city centre are from low purchasing power groups.

These estimates are insightful for further understanding the reduction in visits between Q3 2023 and Q3 2024. It is visits from people from the ‘high purchasing power’ group that have driven the decrease, the number of visits from this group fell by 35% year on year. People from the ‘lower purchasing power’ group increased their number of visits between Q3 2023 and Q3 2024, by 37%.

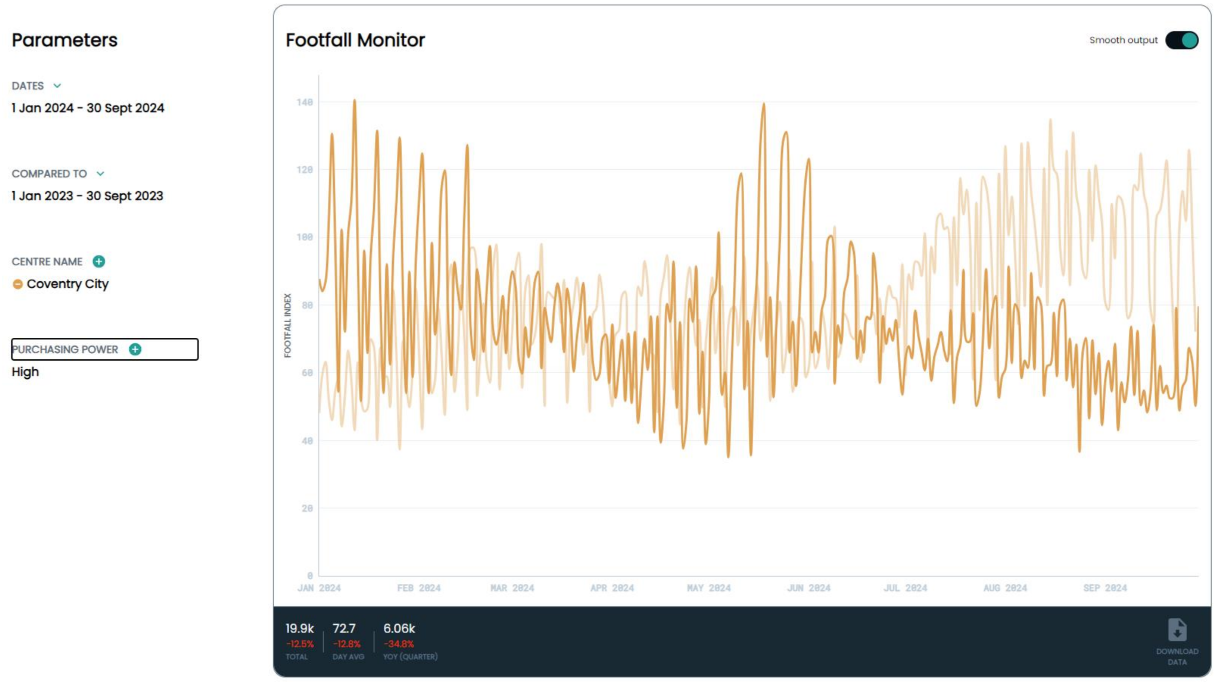
When looking at these trends for Leicester city centre, where the overall trend in visits year-on-year is better than Coventry; the trends are better than Coventry particularly amongst high purchasing power groups: Leicester city centre did experience a fall in visits from such people but not as much as Coventry city centre did.

Below, screenshots from Signals illustrate these trends. The first chart shows Coventry city centre daily trends for January to September 2024 (in dark orange) compared to the same period in 2023 (in a lighter colour), for people allocated to the ‘low purchasing power’ group. The second chart shows the same, for people allocated to the ‘high purchasing power’ group. Compared to the start of the year, footfall in recent months amongst people with low purchasing power has been at a broadly similar level, perhaps down a little, whereas footfall is clearly down amongst people with high purchasing power.

2024 Coventry city centre visitor trends – people with low purchasing power



2024 Coventry city centre visitor trends – people with high purchasing power



Dwell time

Dwell time data, the amount of time each visitor spends in Coventry city centre, is key to understanding footfall in a holistic way, combining with the visitor volume numbers to give an overall understanding of the ‘busyness’ of the city centre. The average amount of time each visitor spent in the city centre recently is shown below, for Q3 2024 it was 102 minutes (1 hour 42 minutes), lower than the previous quarter, but notably higher than Q3 2023, up significantly year-on-year. This is a key counterpoint to the fact the number of visitors were down over this period; while the number of people visiting fell, the average time each person spent increased, the increased dwell mitigates the drop somewhat when it comes to the overall busyness of the city centre. It may be that the increase in dwell meant that the city centre didn’t feel any less busy in Q3 2024 than the same time last year, despite the fact that the number of vistors fell.

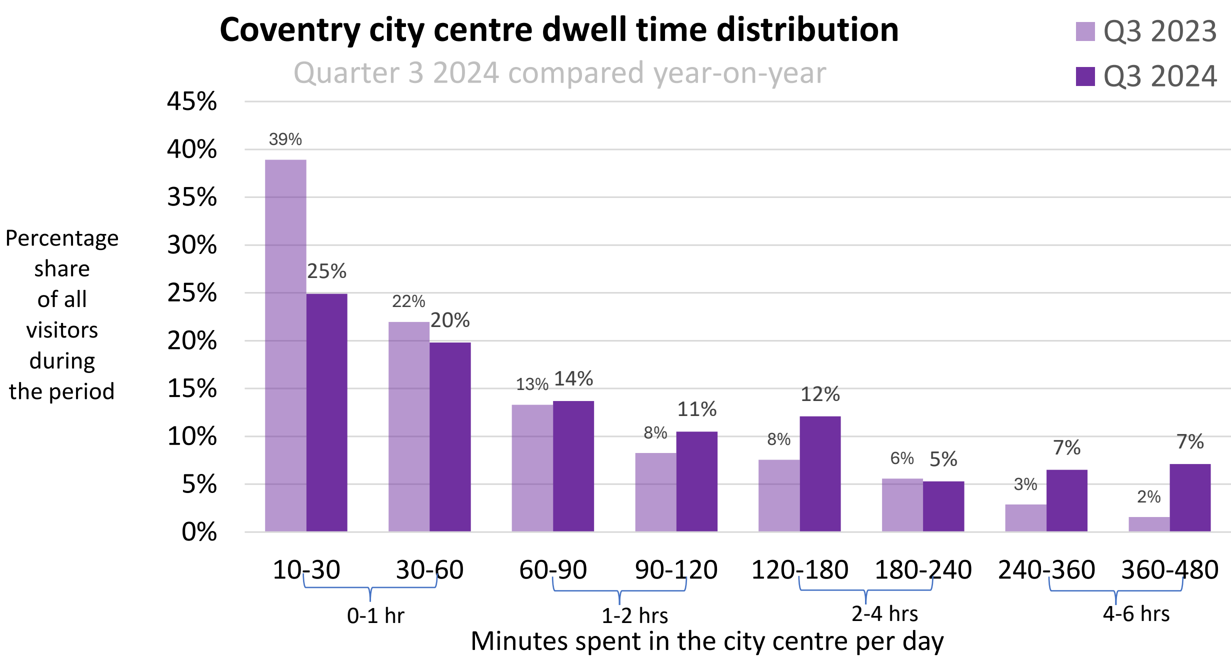
Q3 2024	Q2 2024	Q3 2023
Avg. dwell time	Avg. dwell time	Avg. dwell time
102min	**133min**	**77min**

This raises the question, how much does increased dwell time mitigate a drop in visit numbers? For example, do we prefer one person spending one hour in the city centre or two people spending 30 minutes each?

The increase in dwell time could be due to a number of different dynamics, for example it could be a widespread shift in dwell behaviours of all, with most types of people spending more time in the city centre than before. It also could be because the people who have reduced their number of visits between Q3 2023 and Q3 2024 (leading to the fall in visit numbers we have seen) were those who had low dwell time and therefore a reduced number of these people would increase the average dwell time of all; and other reasons, likely a combination of reasons. Looking further

at the data can start to give some indications of which dynamics are behind recent changes in Coventry city centre use.

These averages hide great variation, most visitors spend less time than this during each visit to the city centre, whereas a relatively small number will spend much more time. The chart below shows the distribution of visitors by the amount of time they spent in the city centre, comparing this for Q3 2024 to Q3 2023 to help us further understand the change over this time.

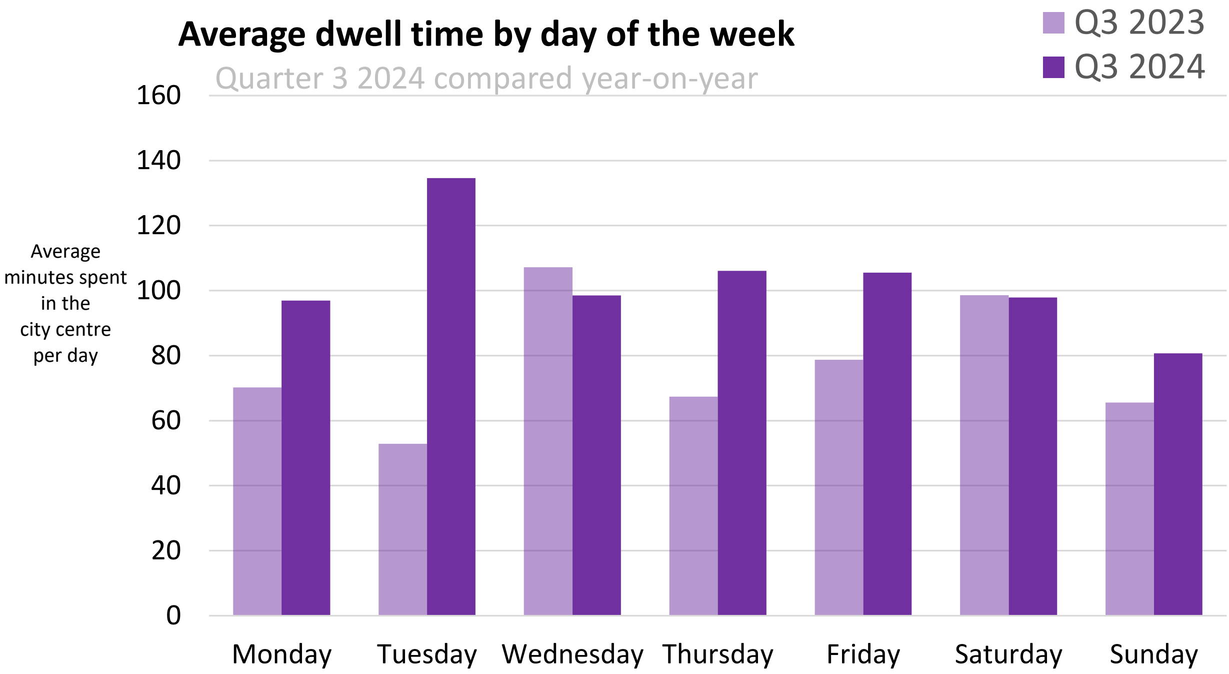


This chart shows that a significantly lower proportion of the Q3 city centre visitors this year spent a short time in the city centre, less than 30 minutes, compared to last year. An estimated 25% of visits in Q3 2024 were for less than 30 minutes, whereas the year before it was much higher at 39%. A notably higher percentage of city centre users in Q3 2024 than Q3 2023 dwelt for relatively long periods, particularly over 4 hours.

Combining the total number of daily visitors and percentage of visitors by dwell time, gives us an estimate of the number of 'person minutes' spent in the city for each quarter e.g. two people visiting for 30 minutes and one person visiting for 60 minutes both gives a total of 60 'person-minutes'. This data for Q3 2024 actually gives a total of *more* person minutes than in Q3 2023 despite the total number of visitors being lower, because those that did visit stayed for longer. So, Coventry city centre may have felt busier in Q3 2024 than it did the year before.

Thinking about different types of city centre visitors and how long they might spend in the city centre on average may help to understand the trends further. For example, we may think that commuters who work in the city or students who study in the city may, on average, have lower dwell time, often just walking through the area from transit points to buildings or to get some lunch. On the other hand, leisure users would likely dwell longer in the city centre, on average. The picture painted by the dwell data indicates that there was a clearly a reduction in the number of visitors with low average dwell time, this at least partly explains the increase in average dwell overall. So, the data may indicate a reduction in the number of visits from commuters, from people working in the city centre – this could be related to office workers and trends of increasing home working. Those who work in city centre offices may be amongst those with higher-than-average purchasing power, so this conclusion would be consistent with the data showing a particular fall in high purchasing power visitors between Q3 2023 and Q3 2024. It is also consistent with the fact that the reduction in the number of visitors was highest on weekdays, particularly Monday and Tuesday.

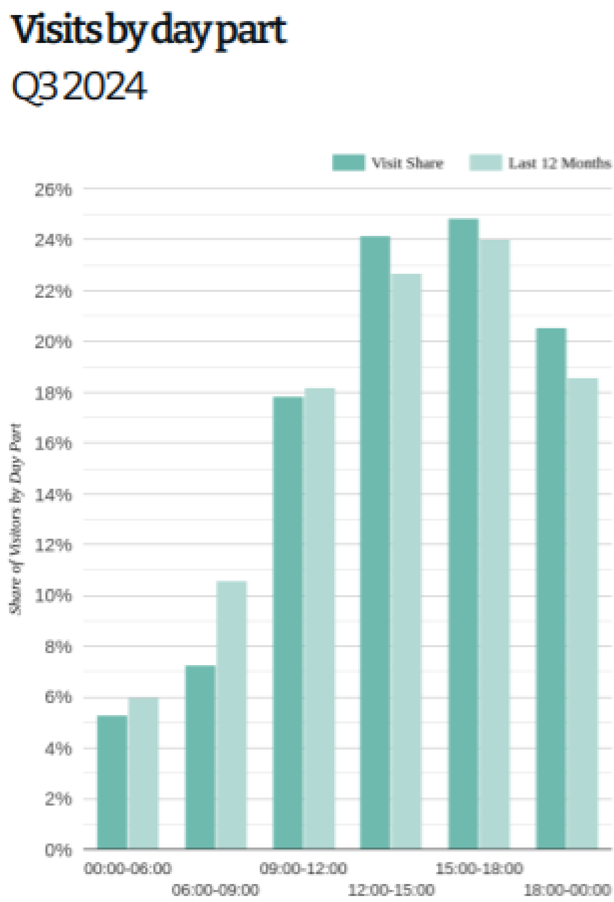
Increasing average dwell time has been a general trend for more than a year, it’s not just a difference between Q3 2023 and Q3 2024. So, the trends in average dwell time are different to the trends in total visitors, which has fluctuated quarter by quarter. This indicates that the increase in average dwell isn’t just a reflection of a reduction in the number of short dwell visitors like office workers, but of other patterns as well. For the changes between Q3 2023 and Q3 2024 the data also indicates a general shift in visitors spending more time in the city centre, and also, despite an overall reduction in the total number of visitors, an indication that there may have been an increase in types of visitors who dwell in the city centre for longer periods, like leisure and evening visitors.



The chart above shows the average dwell time by days of the week, comparing it for visitors during Q3 2024 and the same period the year before. The average dwell time increased on weekdays mainly. It increased most on Tuesdays, which was the day of the week that the number of visitors fell by the most; this may support the indication that there has been a fall in shorter dwelling office workers, a reduction in the number of this type of visitors on Tuesday would increase the *average* dwell time of all visitors on that day.

That data also indicates that, while the number of visitors increased amongst people with relatively low purchasing power and decreased amongst people with relatively high purchasing power, the average dwell time increased amongst both, but by more amongst low purchasing power people.   This supports the hypothesis that while other data indicates a fall in the number of office workers, this isn't the whole story.

Daypart

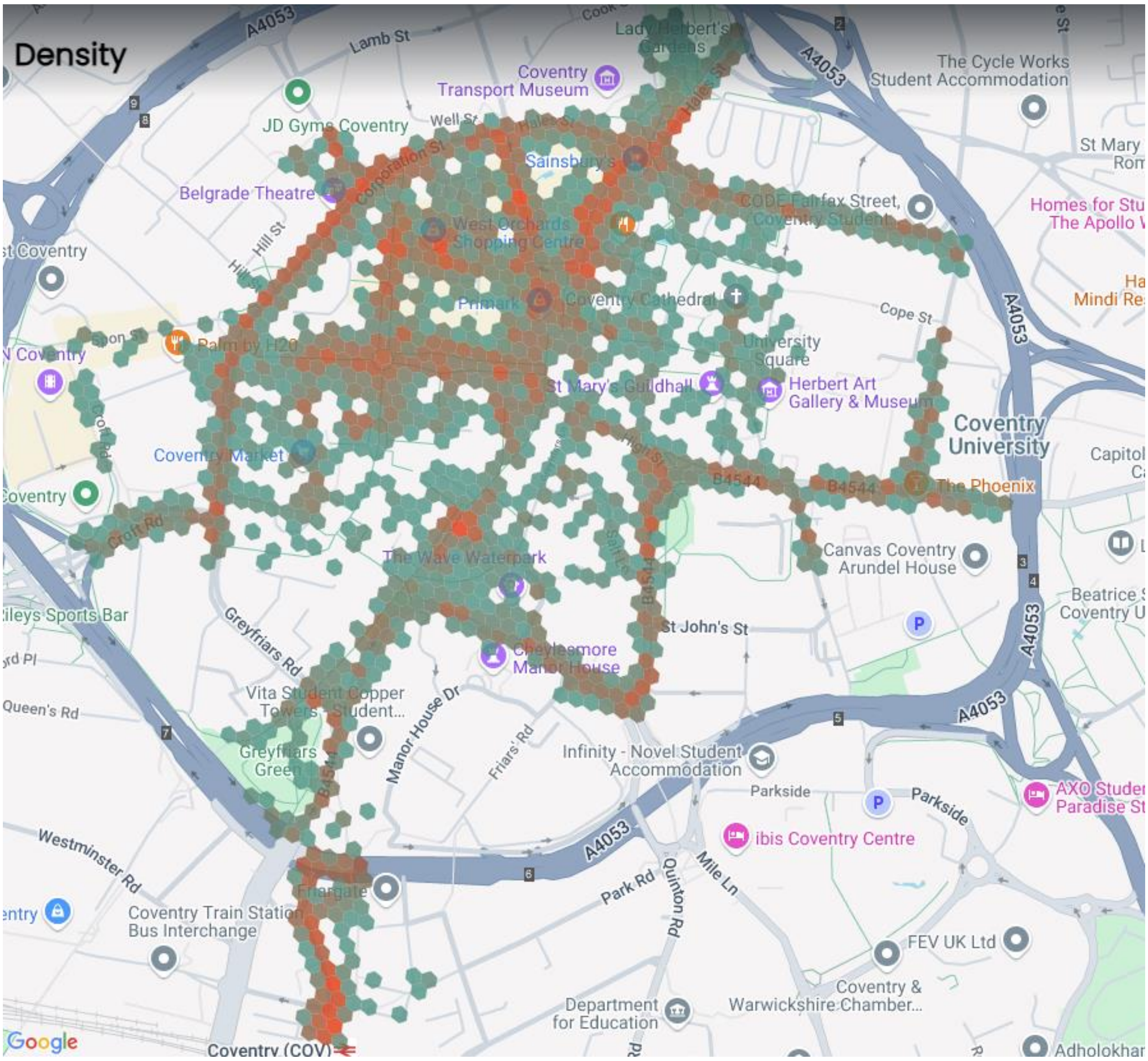


This chart shows the share of visitors by parts of the day, from the early morning to the evening; with the share for Q3 2024 in dark green compared to the share for the last 12 months in light green, illustrating recent changes in patterns. It shows a significantly reduced number of visits in the morning and an increased share in the afternoon and evening. This broadly supports the hypotheses based on the data above, a lower number of visits from office workers in Q3 2024, and an increased share of visits for leisure.

Busiest parts of Coventry city centre

The maps below illustrate the area of the Coventry city centre over which footfall is estimated, and the busiest areas highlighted in bright orange and the less in light green. The two maps compare Q3 2024, on the first map, and Q3 2023. Overall, total city centre footfall was 16.5% lower during Q3 2024 than the same period last year, Q3 2023. This must be considered when comparing the maps for 2024 and 2023, although an on average visitors dwelt in the city centre longer in Q3 2024 compared to Q3 2023, so this will influence the difference between the maps as well; as discussed above, the city centre may have even felt busier in 2024 than the year before.

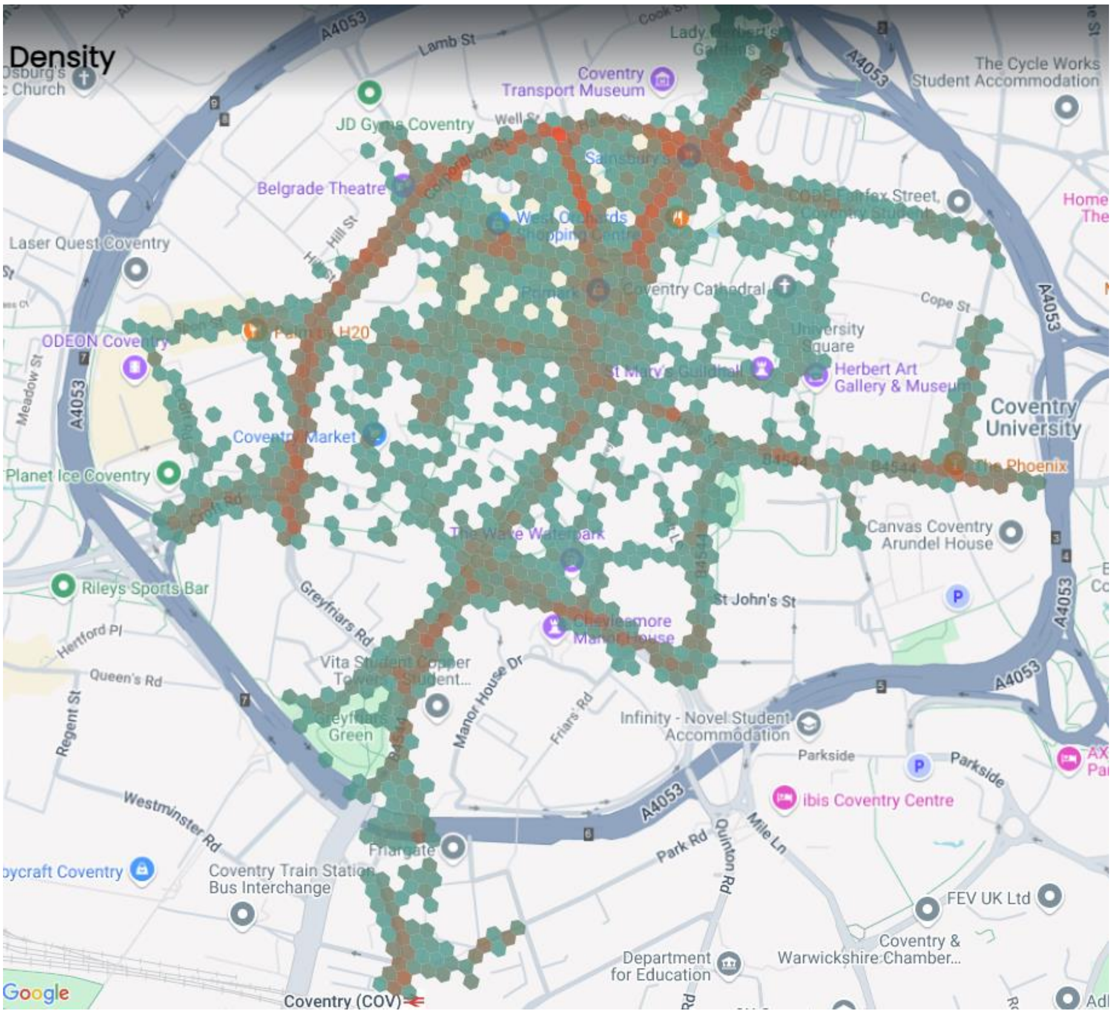
Map for Q3 2024: 1st July – 30th September 2024



There are a number of areas in the city centre shown as busier than others, highlighted in orange on the map. The busiest areas during Q3 2024 are shown as:

- The approach to the railway station
- An area of lower Hertford Street, near China Red
- An area of The Burgess
- Parts of West Orchards shopping centre
- The top of Trinity Street by the Flying Standard pub

Map for Q3 2023: 1st July – 30th September 2023



All those areas that are highlighted above as the busiest during Q3 2024 were relatively busier in Q3 2024 than the same period the year before.

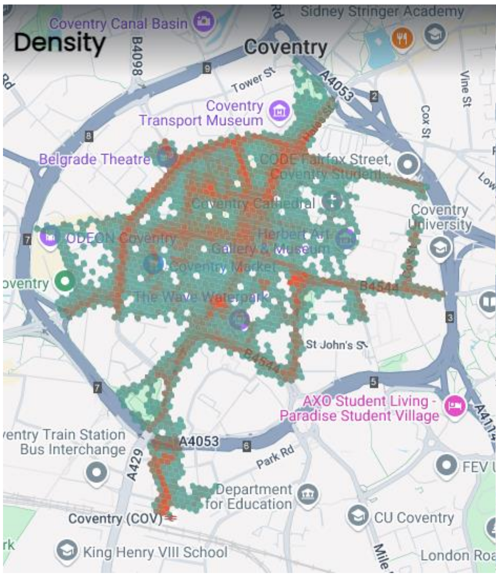
Areas that were relatively less busy during Q3 2024 (busier in Q3 2023 as shown in the 2nd map):

- An area of Corporation Street near the Burgess
- Hales Street and Fairfax Street near Millenium Place and The Whittle Arch
- Queen Victoria Road near the old Ikea building
- New Union Street near The Wave

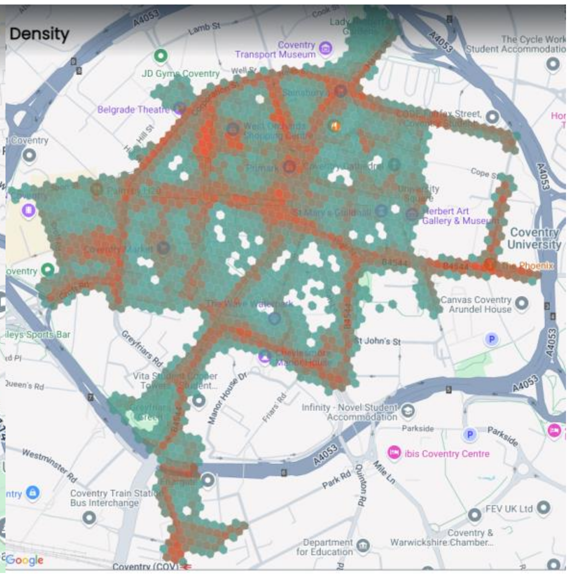
It is difficult to see what these changes mean for patterns of change and whether they support the hypotheses taken from the other data on what is driving the change between Q3 2023 and Q4 2024.

The maps below show longer term trends in which parts of the city centre have been more and less busy, comparing the last 12 months, and the calendar year 2019, pre-pandemic.

Map for Oct. 2023-Sep. 2024.



Map for Jan.-Dec. 2019.

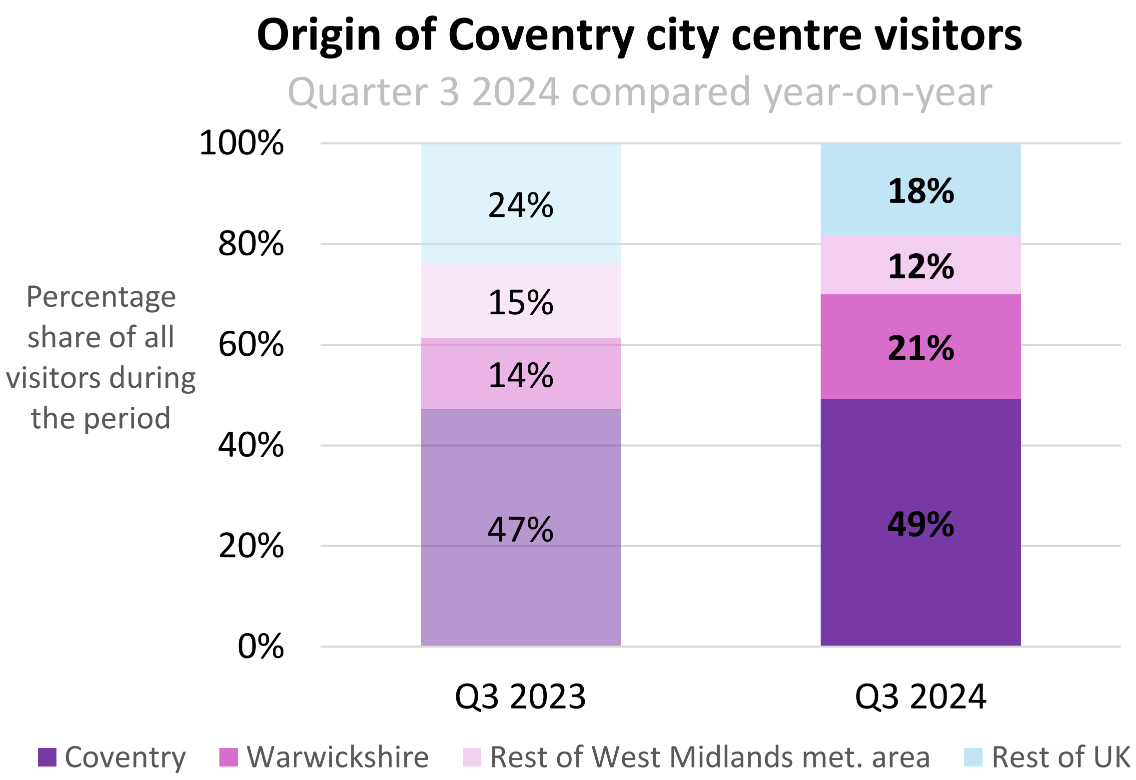


In 2019 the busiest areas were Smithford Way, Broadgate, The Burgess and Gosford Street (Coventry University area). By October 2023 - September 2024, when footfall and busyness was notably down on 2019 levels, this had changed. The most notable areas that have become less busy since 2019 are Gosford Street, Smithford Way, Broadgate and the area in and around the old Ikea building. The areas that are *relatively* busier now are: the approach to the railway station, an area of lower Hertford Street and the area around the Council House and the nearby Wetherspoons pub - although these areas may not be busier overall because total footfall is notably down.

Where do people visit Coventry city centre from?

Signals gives us estimates of where Coventry city centre originate from, where they live, a percentage share of visitors by postcode area. The chart below uses this data to estimate the share of visitors that are from Coventry, and beyond, allowing us to compare Q3 2024 to Q3 2023.

It is important to reiterate that Signals counts 'visitors' to the city centre i.e. it does not include people using the city centre who also live in the city centre – so the data below will be a slight underestimate of the share of city centre users who are local to Coventry.



As estimated by postcode area of origin, about half (49%) of all Coventry city centre visitors between July and September 2024 lived in Coventry, and another 21% lived in Warwickshire, so 7 in 10 were from Coventry or Warwickshire. 12% live in the rest of the West Midlands metropolitan area, that is Birmingham, Dudley, Sandwell,

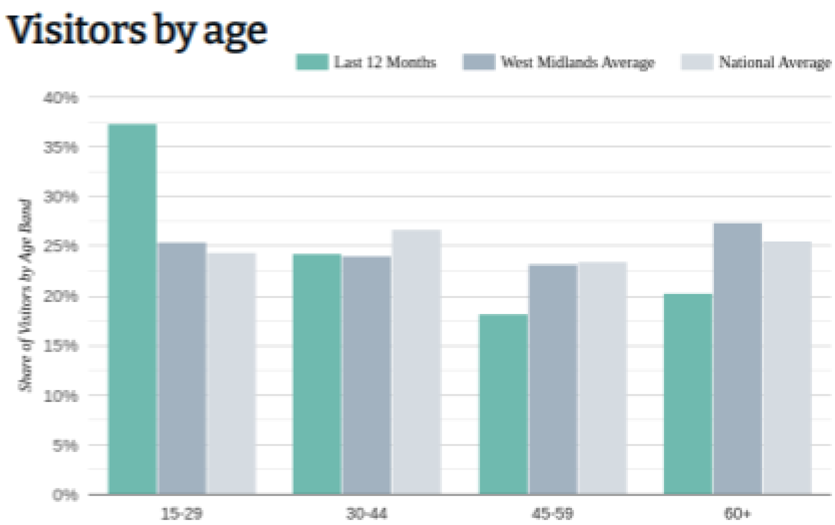
Solihull, Walsall or Wolverhampton, and the rest live in the rest of the UK, 18%. This data does not include tourists/visitors from overseas, although if it did it would be a relatively small percentage.

The chart shows that, over the last year, between Q3 2023 and Q3 2024, an increasing percentage of city centre visitors were local, from Coventry and Warwickshire, and less from the rest of the West Midlands and the rest of the UK. We know that the total number of visitors reducing over this period, so this means the total number of visits from people travelling from further afield in the West Midlands and the rest of the UK reduced notably between these periods. Also, while the local Coventry *share* increases, the total number visits from people who live in the city was also down a little, while the number of visits from people who live in Warwickshire increased.

The biggest change locally was an increase in the proportion from the CV6 postcode areas, up from 11.4% of visitors in Q3 2023 to 16.5% in Q3 2024. This is an area that stretches from neighbourhoods near the city centre out north eastwards, covering areas such as Foleshill. People living in these areas, on average, tend to have lower than average incomes.

We can combine these findings with the insights from the other data explored in this report, to try and further understand the recent trends, between Q3 2023 and Q3 2024. The pronounced reduction in visits from outside Coventry & Warwickshire may indicate a reduction in commuters, as also suggested above - that the falling number of short stay and high purchasing power visitors indicates reducing office workers. A reduction in the number of visitors travelling from further away is also consistent with the trend of reducing numbers of high purchasing power visitors, possibly indicating reduced business visits and other tourism. However, tourists and business visitors are perhaps more likely to have longer than average dwell times in the city centre, particularly overnight stayers – so the trend of increased dwell time (although much of this issue to a reduction in short staying visitors) suggests the data isn't clear that tourism has reduced, or at least that this isn't the main story. The increase in the average dwell time, and the data by day and daypart, may indicate increased leisure and evening use of the city centre – these may be amongst people living in Coventry and Warwickshire. The increasing numbers of visitors from neighbourhoods in the CV6 area of Coventry is consistent with an increasing number of visitors from low purchasing power groups.

Age of visitors



This chart shows that in the last 12 months a notably higher percentage of visitors to Coventry city centre were young, aged 15-29, compared to the regional and national averages. This is perhaps unsurprising, reflecting the city's relatively young population, and also the large number of full-time university student living near the city centre. This is consistent with the data that shows that Coventry city centre's visitors are more likely to have lower purchasing power than regional and national averages.

It is important to reiterate that this this data does not count people living in the city centre area covered (see maps above for the area), so it won't count all students and young people as some live in halls in the city centre area itself. It will include many students who live just outside that area, and many who don't live in Coventry but use the city centre when they visit the Coventry University campus based in and near the city centre area covered.

Coventry City Council

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