Coventry City Centre Footfall: Q3 2024 – Summary Report

Footfall during July – September 2024

Insight
13/12/2024

Background

This report presents analysis of measures of footfall in Coventry city centre for quarter 3 (Q3) 2024, the period July – September 2024. It is a summary report, presenting the main findings from the full report which can be read here. The report is designed to give a more detailed picture of the data from Signals than is presented in monthly headline reports published here. Trends in the main headline measure are presented on dashboards published on our website here.

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. The estimated number of visitors is a measure of the volume of people living outside the city centre who visit Coventry city centre, and spending some time by foot.

The data is sourced from the 'Signals' platform provided to us by external company Huq Industries. The data is an estimate based on modelling using mobile phone app data from a sample of smart phone users. As it is based on a sample the headline daily visitor figures are *estimates*, so we aggregate them by month, quarter and year to get a robust indication of real trends. The benefit of using this method is that anonymised location data from phone apps enable further insight, including estimating how long each visitor spends in the city (dwell), and the postcode area of where the phone usually 'lives' enables estimates of where people visit from and an estimate of the level of 'purchasing power' each visitor may have by putting them into estimated income groups based on their postcode.

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').

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 main report. 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.

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.