PLACE PERFORMANCE REPORT

City Of London

This report explores each of the insight modules provided through Huq's place performance platform and discusses the significance of what the data tells us. This report is offered as part of Huq's unique Customer Success offering, which has been created to help users obtain maximum value from the service Huq provides.

Prepared by Gemma Mariotti, Customer Success Manager

5 Apr 2023

Aims & Objectives

The aim of this report is to provide a detailed view of the insights available for each of the centres monitored to highlight the trends and themes observed across the council.

We will explore each of the centres and insight modules in turn, drawing comparisons between individual dimensions and the overall picture to detect noteworthy behaviour. The outcome of this analysis can be applied to a range of considerations, not least:

- Centre performance before and after interventions
- Change relating to macro themes such as Covid-19
- The effect of seasonality on KPIs from centre to centre
- Impacts following the use of central government funds

This report is provided as part of Huq's unique Customer Success programme, designed to help our valued customers derive greatest value from the place performance insights we provide.

Methodology

Huq is the only measurement provider to put reliability at the heart of what it does. Our platform owns the end-to-end measurement process from collection to processing, storage and publication. Every element of our systems are known, qualified and optimised for accuracy.

- 1st-party data collection and proprietary processing
- Academic and peer-verified measurement accuracy
- Used by 70+ councils, real-estate and retail companies
- Used by central government to drive funding priorities

Thanks in advance for reading this report. We hope you find it insightful and welcome your questions.

Gemma Mariotti,
Customer Service Manager

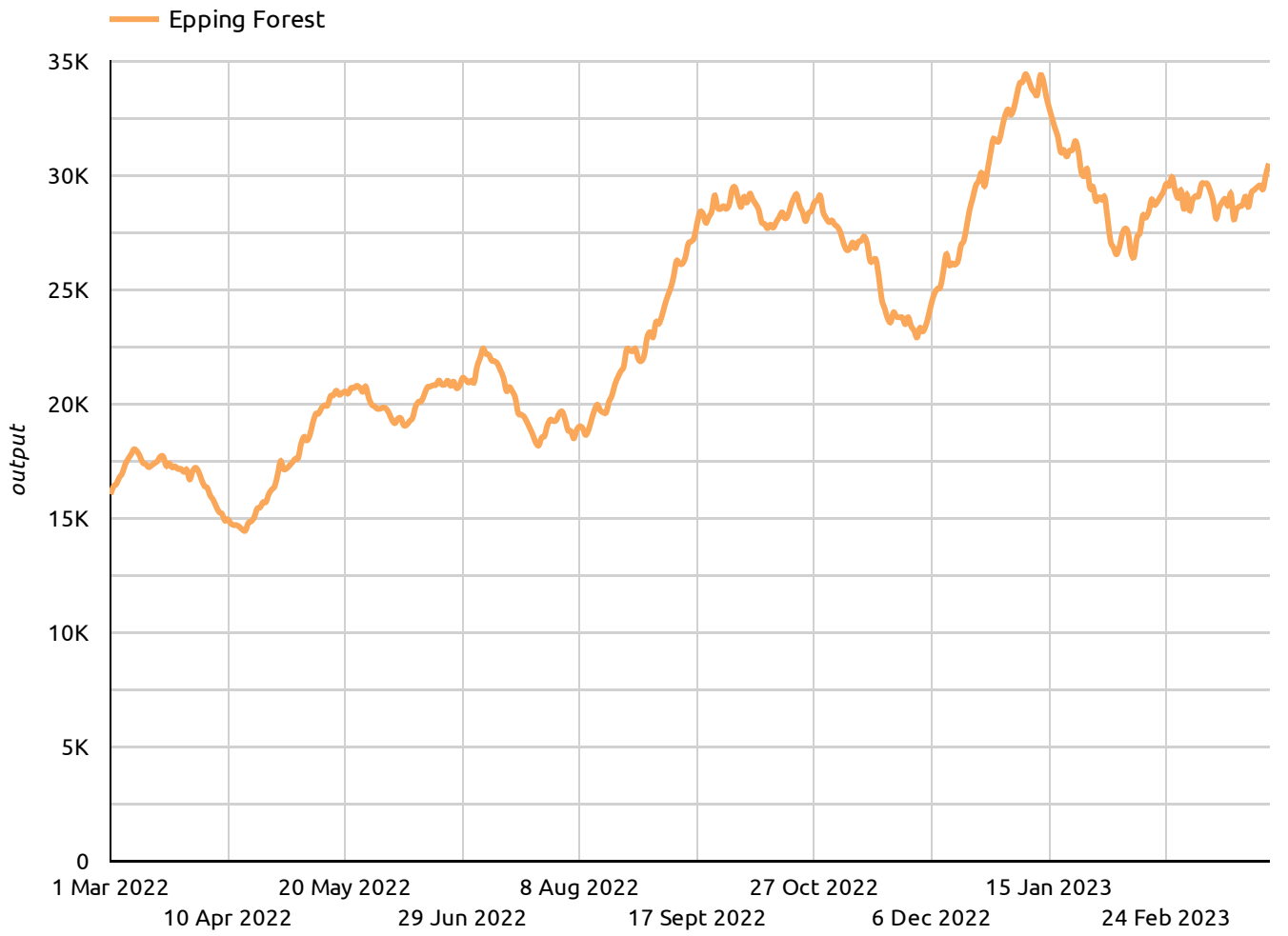
CITY OF LONDON

Focus on Epping Forest

The following section explores place performance across the insight modules included for this centre.

This report has been prepared as part of Huq's bespoke Customer Success offering.

Footfall Overview | City Of London



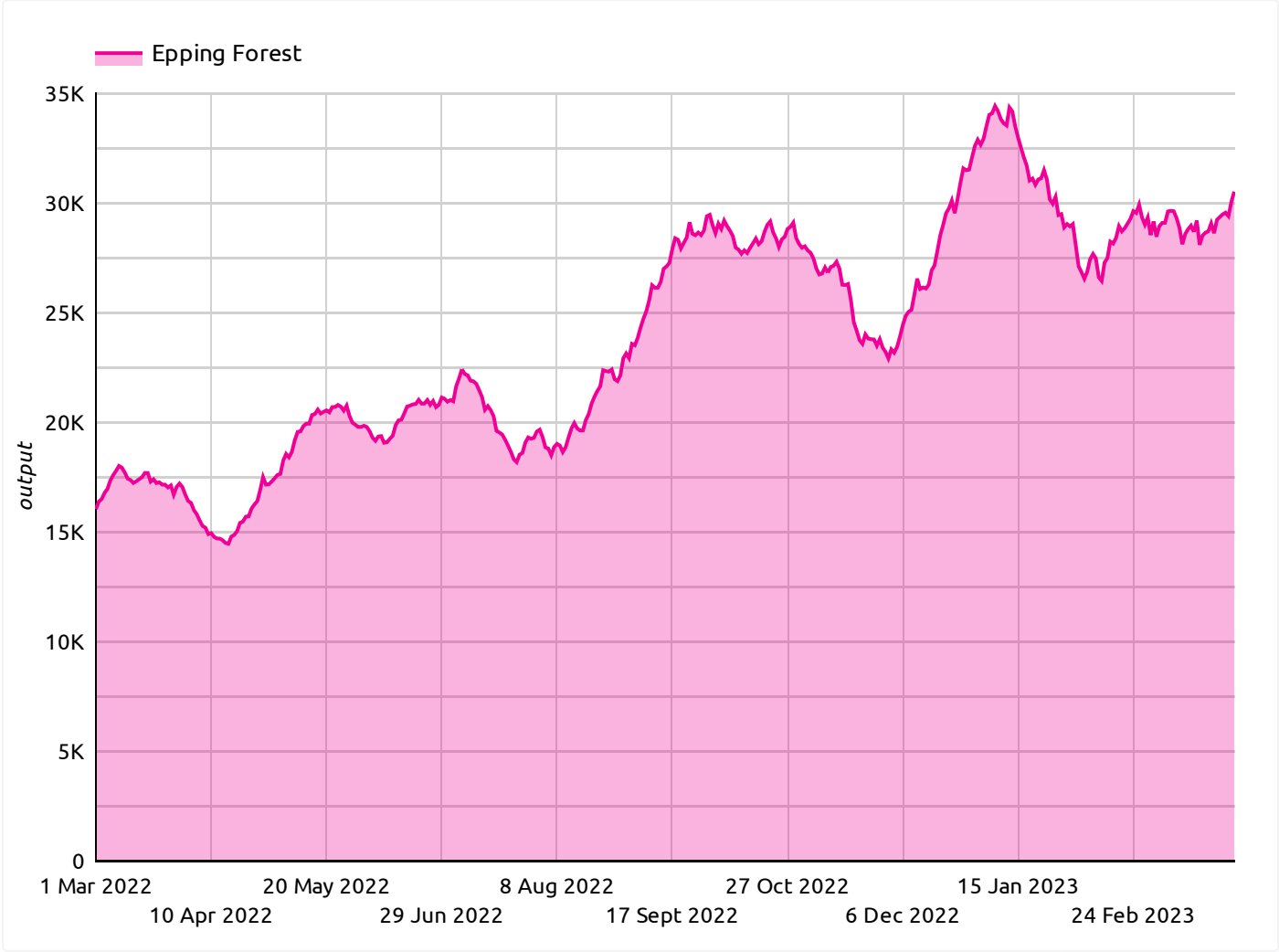
What is Footfall Monitoring?

Footfall is the number of unique people in an area at a given time. It's the main way that councils, retailers and real-estate assess the performance of places.

Why use it?

Use footfall insight if you're opening a store and you want to know how many customers you could attract. Use footfall to learn where needs support and how interventions succeed. You can also use footfall insight to weigh up real-estate investment candidates and pick the one with the greatest potential.

Footfall Last 12 Months | Epping Forest

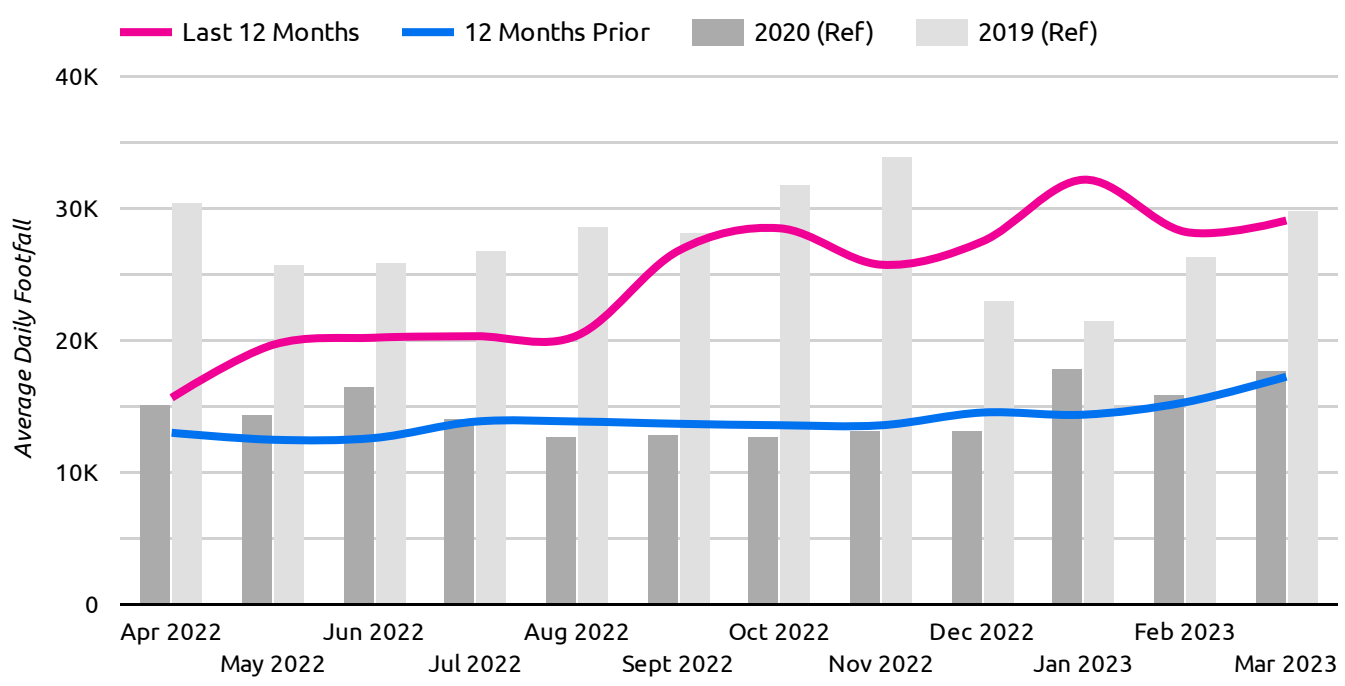


March footfall in Epping Forest down 3% on Q1 2023 at 29,079

The average footfall for Epping Forest in March, the last full month, was 29,079 unique visitors per day. That's a decrease of 3% compared to the daily average for Q1 2023 (the last full quarter) and a rise of 69% versus the March prior.

The month with the highest footfall for Epping Forest over the last 12 months was January with an average daily footfall of 32,163, and the lowest was April with 15,654 visitors per day.

Average Daily Footfall | Epping Forest



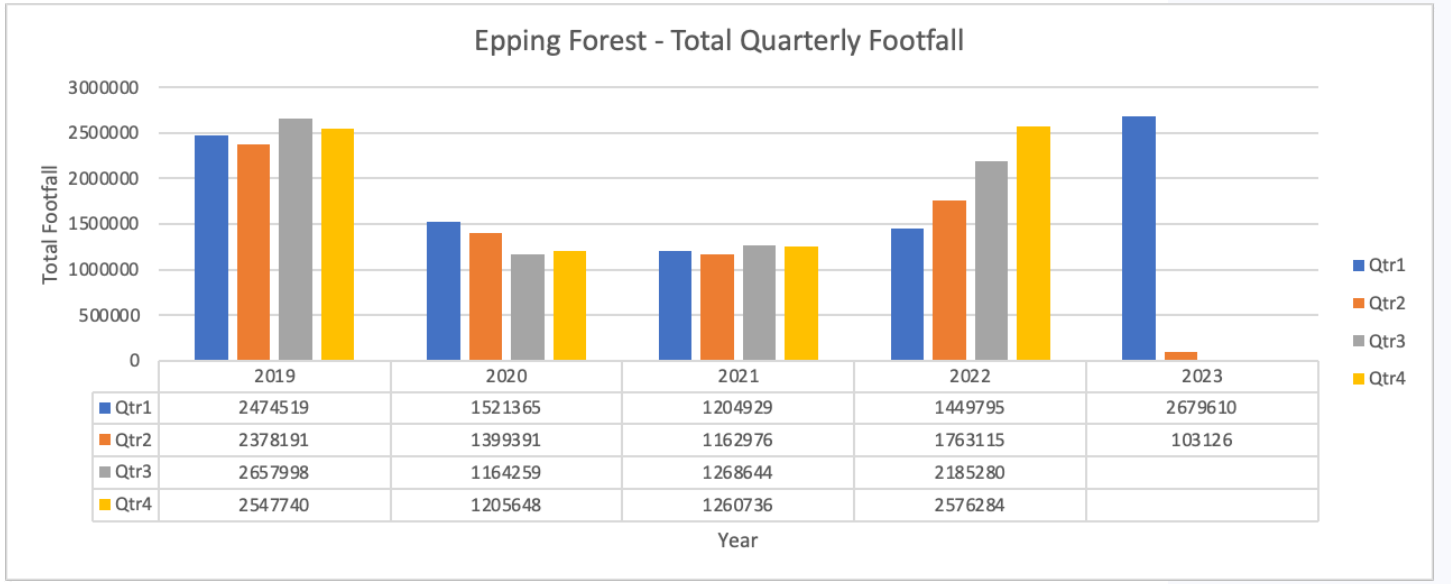
The highest month for footfall in the last 12 months was January at 32,163

Average daily footfall for the month of March in Epping Forest was 29,079. This is up 69% on the same month in the previous year, and up 115% on the year before that.

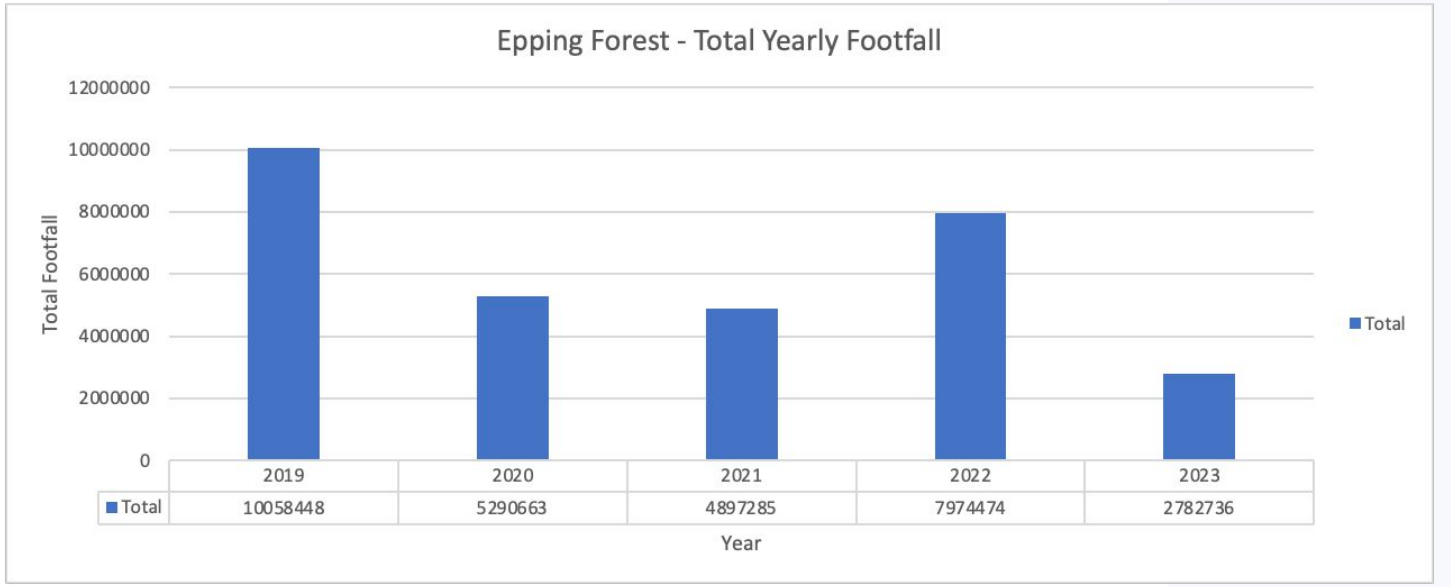
Average footfall for the month compared to the equivalent month in 2019 (the last pre-pandemic year) is down 2%. The month with the highest average daily footfall in the last 12 months was January, at 32,163, and the lowest was April with 15,654.

Period	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sept 2…	Oct 2022	Nov 2022	Dec 2022	Jan 2023	Feb 2023	Mar 2023
1. 2019 (Ref)	30,528	25,800	25,917	26,810	28,695	28,222	31,770	33,957	22,992	21,561	26,315	29,812
2. 2020 (Ref)	15,176	14,348	16,494	14,067	12,692	12,821	12,713	13,212	13,208	17,892	15,966	17,736
3. 12 Months Pr…	13,003	12,476	12,609	13,848	13,856	13,684	13,575	13,568	14,537	14,373	15,308	17,247
4. Last 12 Months	15,653	19,661	20,202	20,315	20,361	26,778	28,485	25,730	27,486	32,163	28,219	29,079

Total Footfall | Epping Forest



	2019	2020	2021	2022	2023
Qtr1	2474519	1521365	1204929	1449795	2679610
Qtr2	2378191	1399391	1162976	1763115	103126
Qtr3	2657998	1164259	1268644	2185280	
Qtr4	2547740	1205648	1260736	2576284	



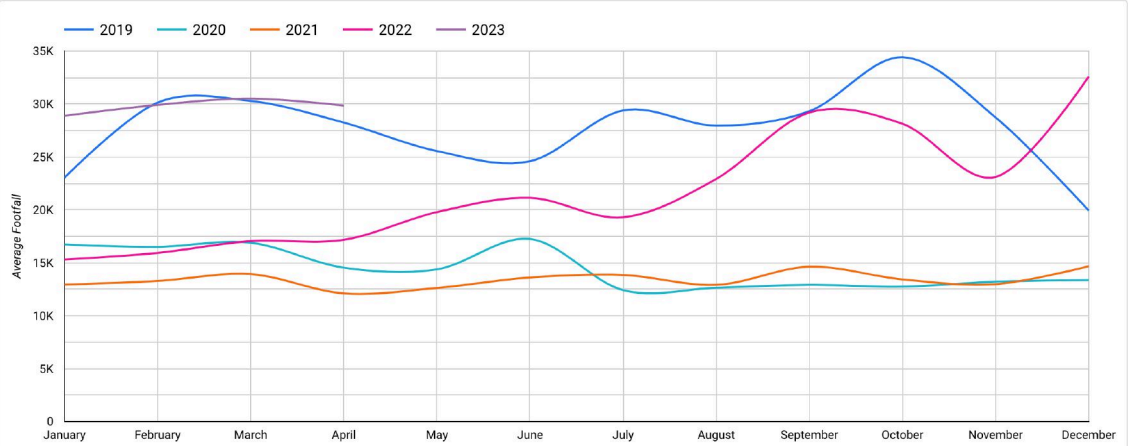
	2019	2020	2021	2022	2023
Total	10058448	5290663	4897285	7974474	2782736

Total footfall up 63% in 2022

The top graph shows total quarterly footfall for Epping Forest across the last four years and in 2023 to date. We can see an increase to footfall across all four quarters last year when compared to the previous year, with a quarter on quarter increase as the year progressed. 2022 footfall remained below pre pandemic levels across the first three quarters, but Q4 was very similar in terms of footfall volume to Q4 2019.

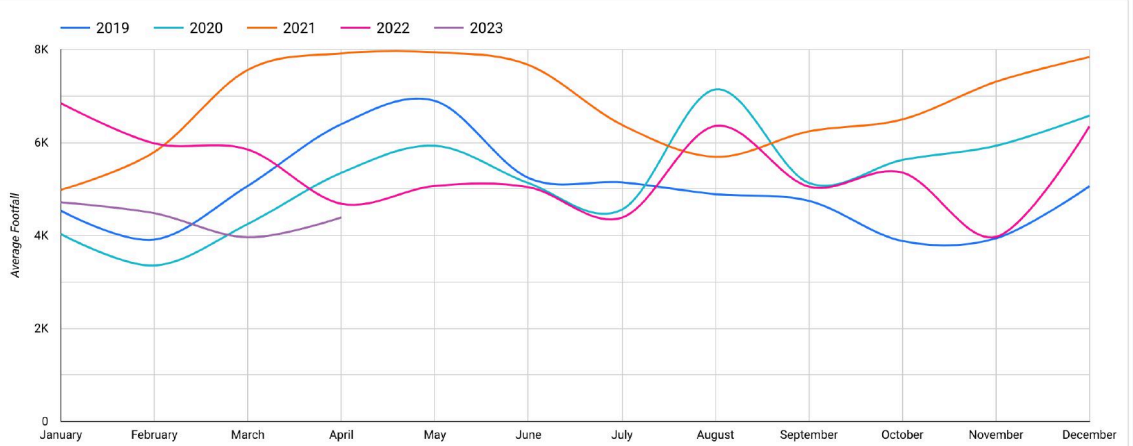
The bottom graph shows total yearly footfall for Epping Forest across the last four years and in 2023 to date. We can see an initial decrease in 2020, with a further decrease in 2021. 2022 saw a 63% increase on the previous year, with Q1 2023 seeing the highest footfall levels on record.

Total Footfall | Epping Forest/Heaton Park Comparison



Month / Average Footfall												
Period	January	February	March	April	May	June	July	August	September	October	November	December
2023	28,892	29,922	30,521	29,859	-	-	-	-	-	-	-	-
2022	15,316	15,936	17,058	17,175	19,796	21,140	19,301	22,927	29,208	28,138	23,110	32,603
2021	12,941	13,284	13,929	12,107	12,622	13,617	13,854	12,913	14,629	13,429	12,978	14,680
2020	16,736	16,508	16,897	14,535	14,379	17,253	12,416	12,645	12,912	12,745	13,213	13,360
2019	23,049	30,142	30,293	28,255	25,563	24,604	29,399	27,960	29,329	34,434	28,741	19,938

Epping Forest - YOY Footfall



Month / Average Footfall												
Period	January	February	March	April	May	June	July	August	September	October	November	December
2023	4,712	4,476	3,958	4,387	-	-	-	-	-	-	-	-
2022	6,844	5,979	5,847	4,680	5,064	5,038	4,381	6,356	5,048	5,352	3,969	6,347
2021	4,980	5,794	7,561	7,915	7,938	7,667	6,378	5,691	6,238	6,495	7,305	7,837
2020	4,029	3,352	4,246	5,346	5,928	5,126	4,553	7,142	5,128	5,623	5,927	6,577
2019	4,531	3,909	5,066	6,393	6,895	5,236	5,141	4,886	4,743	3,878	3,936	5,059

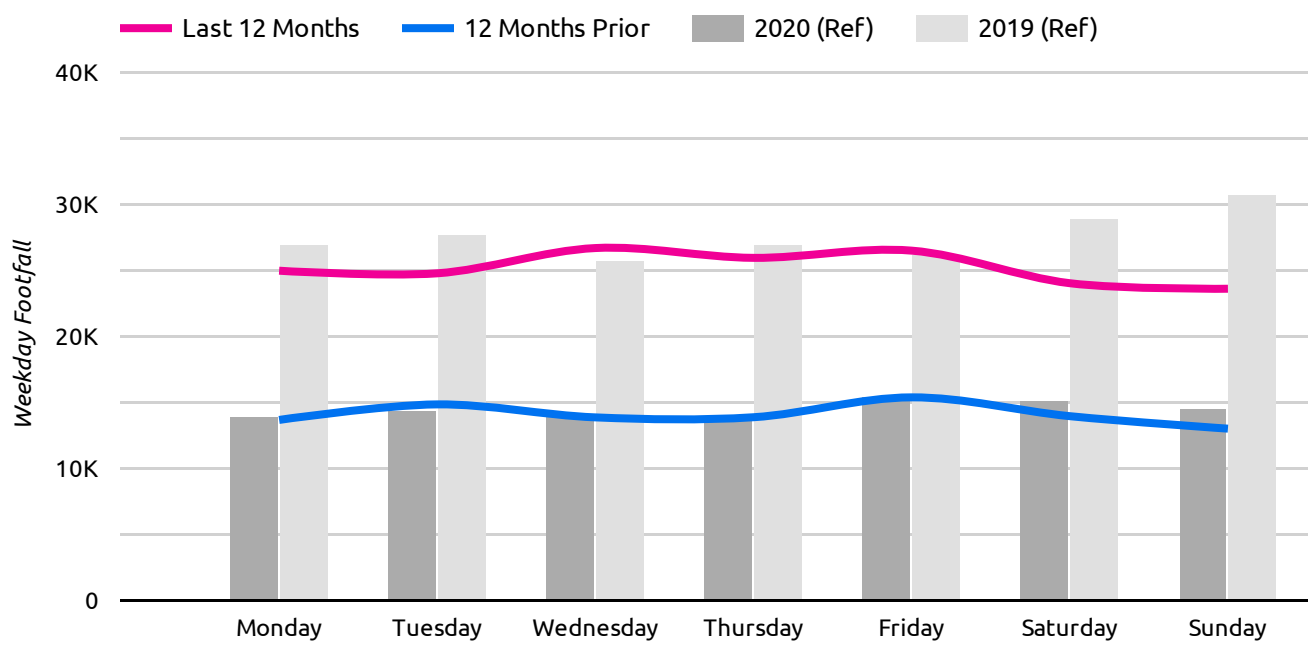
Heaton Park (Manchester) - YOY Footfall

Epping Forest has seen slower recovery than our comparative location, with increases from April 2022 onwards

The top graph shows total yearly footfall for Epping Forest across the last four years and in 2023 to date, with Heaton Park (Manchester) as a comparative location. We can see less of an impact from the pandemic to Heaton Park when compared to Epping Forest, with increases observed during the Summer holiday period and a further increase the following year in Heaton Park.

Epping experienced a more immediate decrease in activity during the pandemic year, with a clear drop coinciding with the first Covid lockdown, a small peak in June, then remaining lower for the remainder of 2020 and continuing at similar levels throughout 2021. Epping Forest saw a positive increase to footfall throughout 2022, with a particular increase from May onwards and peaks from September - October and again in December. 2023 to date has seen high levels of footfall, exceeding pre pandemic levels in January and March. This is a contrast to Heaton Park which saw a significant decrease to footfall in 2022, with more resemblance to pre pandemic levels. 2023 has also seen lower footfall levels in Heaton Park when compared to the two previous years.

Average Weekly Footfall | Epping Forest



Period	(1) Mon	(2) Tue	(3) Wed	(4) Thu	(5) Fri	(6) Sat	(7) Sun
1. 2019 (Ref)	27,006	27,742	25,805	26,900	26,223	28,997	30,759
2. 2020 (Ref)	13,977	14,346	14,006	13,642	15,528	15,220	14,492
3. 12 Months Prior	13,673	14,850	13,866	13,878	15,382	13,958	13,013
4. Last 12 Months	24,972	24,774	26,686	25,944	26,490	24,025	23,606

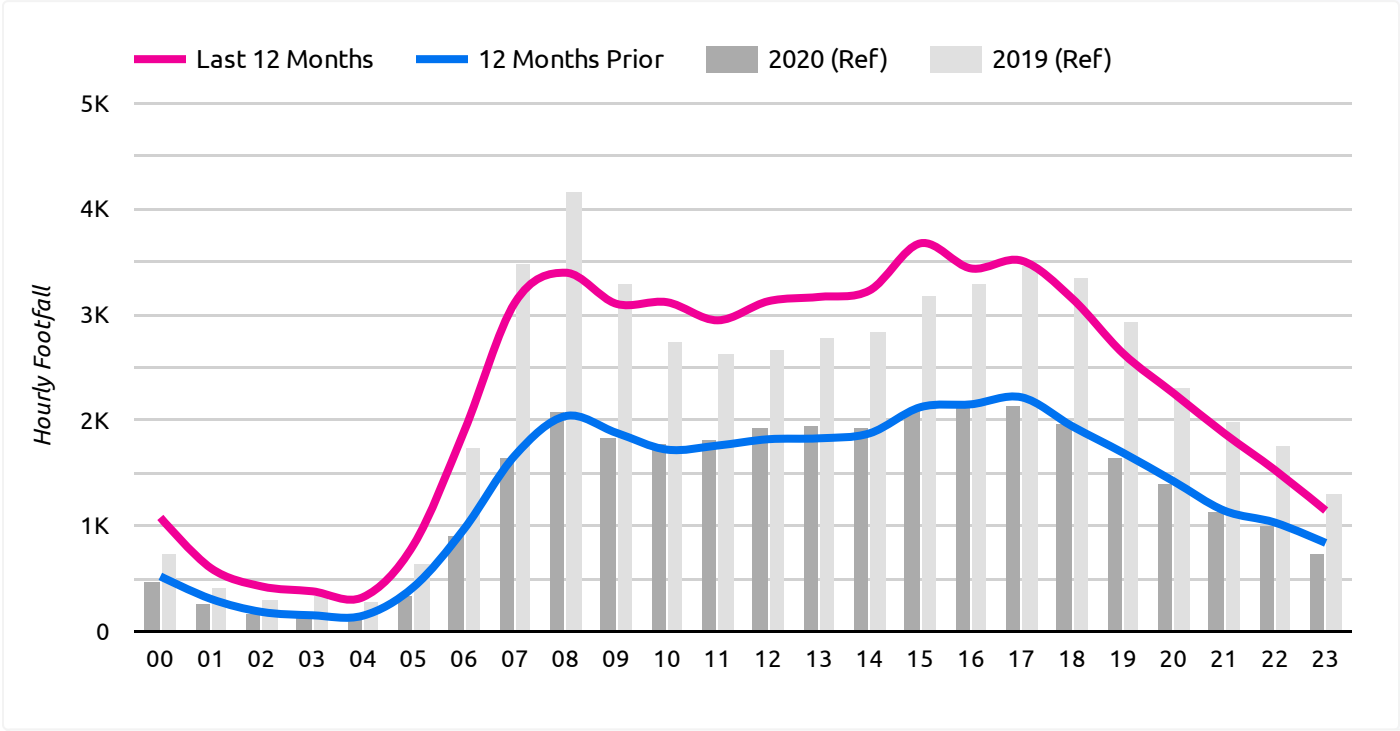
Wednesdays see peak centre footfall of 26,686 visitors over the last 12

Over the last 12 months to March 2023, Epping Forest attracted an average unique weekday footfall of 25,776 and an average weekend footfall of 23,815. The highest day overall was Wednesday, with 26,686 unique visitors per day.

The highest weekday (Mon-Fri) in terms of footfall was Wednesday at 26,686. That's 4% above the total weekday mean. The weekday with the lowest footfall was Tuesday at 4% under the mean.

Weekends average 23,815 across both days - that's 8% less than on weekdays together. In 2019 the highest weekday for footfall was Tuesday, and weekdays together attracted 12% more footfall than on weekends.

Weekday Hourly Footfall | Epping Forest



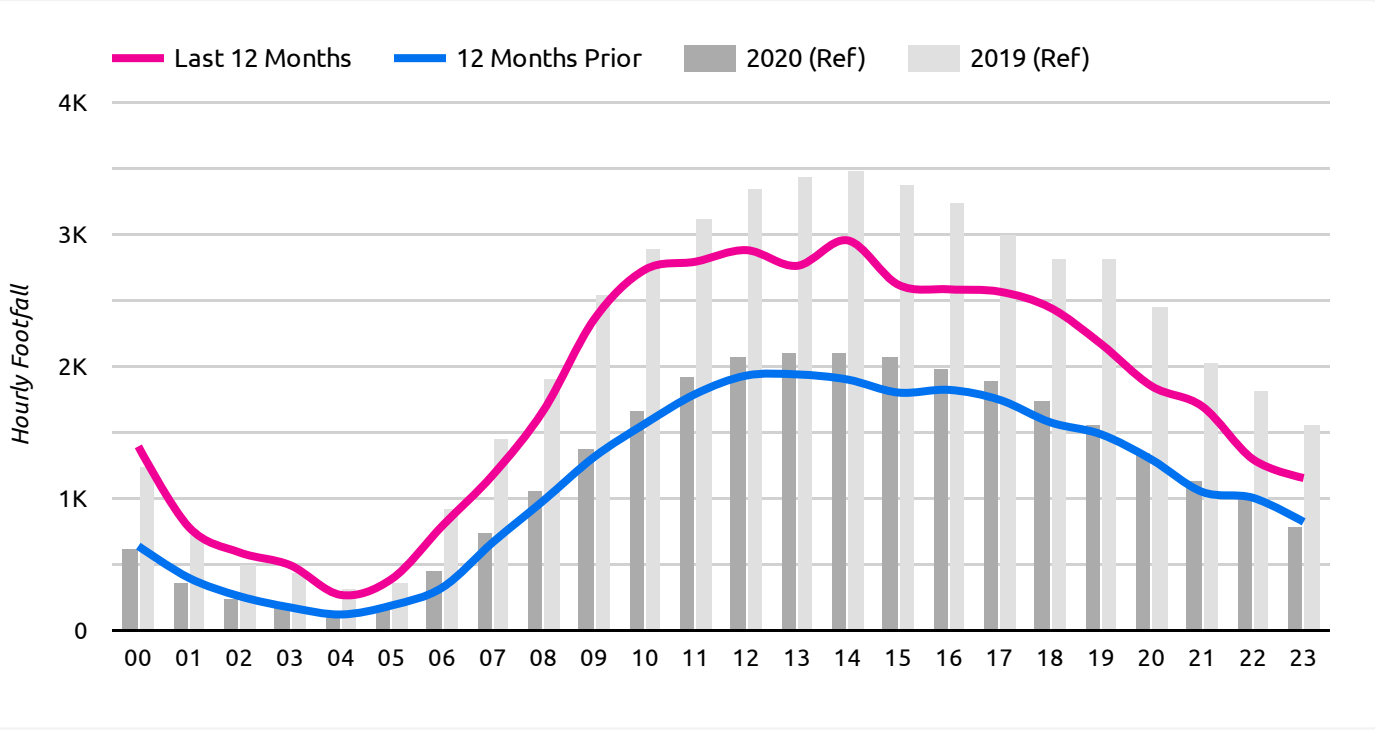
Over the last 12 months, the peak hour for weekday footfall was 15:00

The way that hourly footfall trends evolve reflect the changing way that visitors use centres across City Of London. For Epping Forest over the last 12 months, the peak hour for footfall was 15:00 with 3,674 unique visitors per hour.

In 2019, the peak times for footfall were 07:00 and 08:00. Even though absolute volumes may differ, the weekday footfall hourly trend is currently 3% away from its pre-pandemic profile.

Period	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
1. 2019	735	415	301	341	279	642	1.7k	3.5k	4.2k	3.3k	2.8k	2.6k	2.7k	2.8k	2.8k	3.2k	3.3k	3.5k	3.3k	2.9k	2.3k	2k	1.8k	1.3k
2. 2020	471	263	174	151	168	337	912	1.6k	2.1k	1.8k	1.8k	1.8k	1.9k	1.9k	1.9k	2.1k	2.1k	2.1k	2k	1.6k	1.4k	1.1k	1k	744
3. Last 12	522	308	186	154	150	422	973	1.7k	2k	1.9k	1.7k	1.8k	1.8k	1.8k	1.9k	2.1k	2.2k	2.2k	1.9k	1.7k	1.4k	1.1k	1k	838
4. 12 Prior	1.1k	599	427	381	326	822	1.9k	3.1k	3.4k	3.1k	3.1k	2.9k	3.1k	3.2k	3.2k	3.7k	3.4k	3.5k	3.2k	2.6k	2.3k	1.9k	1.5k	1.1k

Weekend Hourly Footfall | Epping Forest



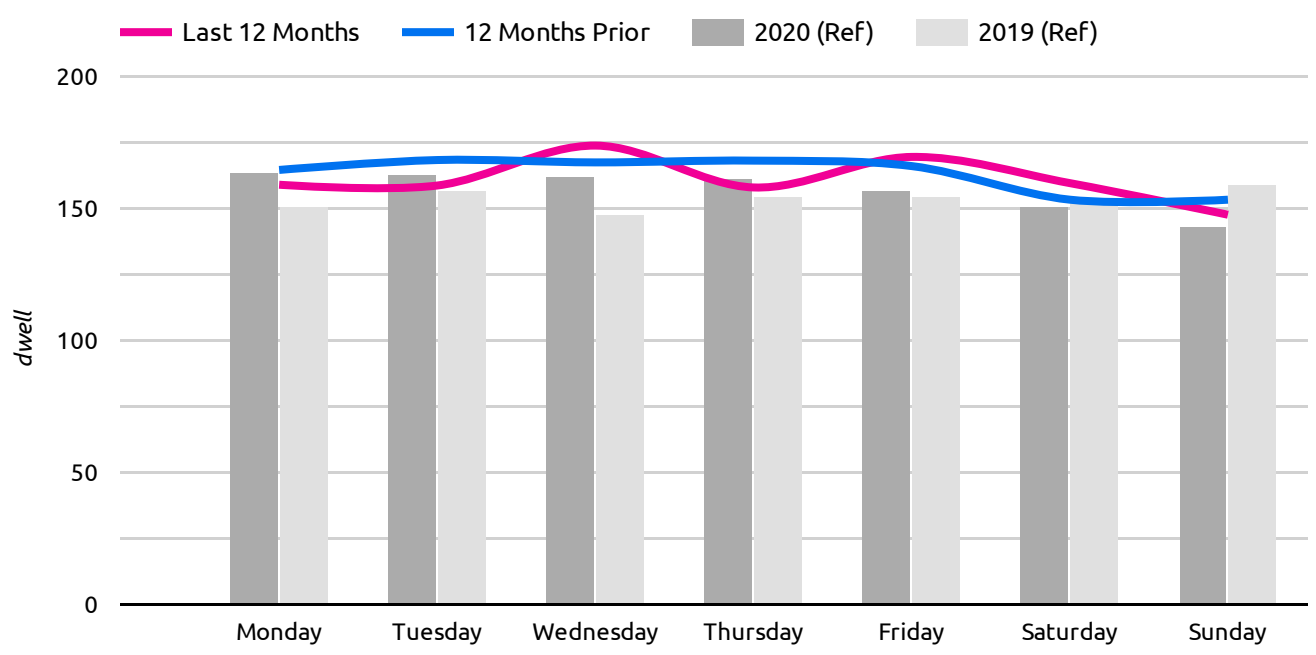
Weekend footfall profile just 2% away from its 2019 trend

The reasons that visitors use centres on weekends vs weekdays differ. Accordingly, the 2019 profile for hourly footfall on weekends includes a consistent level of usage from the morning to early evening.

For Epping Forest on weekends over the last 12 months, the peak time to visit was 14:00 with 2,954 unique visitors per hour. This trends down 21% to 2,444 by 18:00. The weekend footfall hourly trend is currently just 2% away from its 2019 shape.

Period	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
1. 2019	1.2k	725	506	438	318	366	928	1.5k	1.9k	2.5k	2.9k	3.1k	3.3k	3.4k	3.5k	3.4k	3.2k	3k	2.8k	2.8k	2.5k	2k	1.8k	1.6k
2. 2020	623	370	245	189	144	186	450	741	1.1k	1.4k	1.7k	1.9k	2.1k	2.1k	2.1k	2.1k	2k	1.9k	1.7k	1.6k	1.4k	1.1k	1k	790
3. Last 12	639	398	260	175	122	190	325	669	985	1.3k	1.6k	1.8k	1.9k	1.9k	1.9k	1.8k	1.8k	1.7k	1.6k	1.5k	1.3k	1k	1k	822
4. 12 Prior	1.4k	782	591	494	269	390	793	1.2k	1.7k	2.4k	2.7k	2.8k	2.9k	2.8k	3k	2.6k	2.6k	2.6k	2.4k	2.2k	1.8k	1.7k	1.3k	1.2k

Average Dwell-time | Epping Forest



Period	(1) Mon	(2) Tue	(3) Wed	(4) Thu	(5) Fri	(6) Sat	(7) Sun
1. 2019 (Ref)	151	157	148	155	155	152	159
2. 2020 (Ref)	163	163	162	161	157	151	143
3. 12 Months Pr…	165	168	167	168	166	153	153
4. Last 12 Months	159	159	174	158	169	160	148

Dwell-time in the 12 months to March '23 5% above the 2019 mean

The average duration of visits to centres provides an indication of why visitors use them - often inline with leisure and convenience purposes. Visit duration has also been shown to correlate closely with spend. In the last 12 months, the average weekly visit duration for Epping Forest was 5% above the 2019 pre-pandemic mean.

The day with the longest visit duration over the course of the week is Wednesday with 174 minutes, and the day with the least is Sunday with 148. On average, weekdays attracted a visit duration of 164 minutes and weekends 154.

Catchment Area Overview | Epping Forest

What are Catchment Areas?

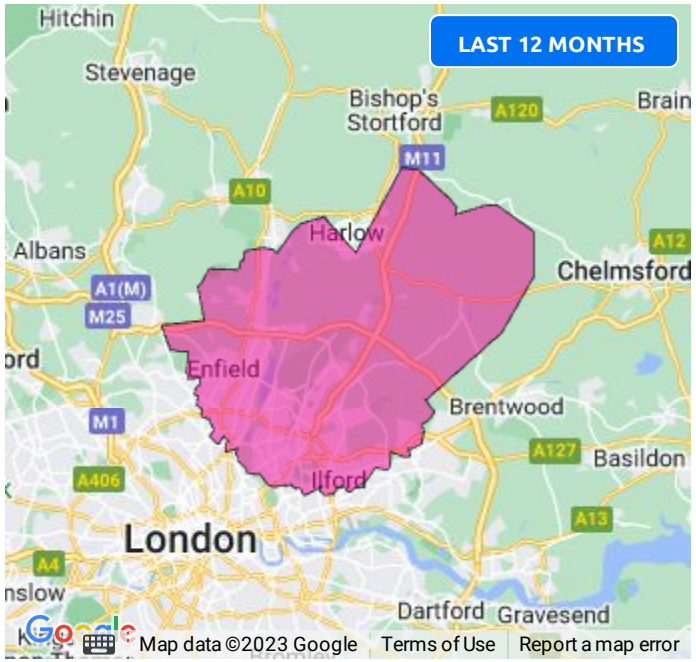
Catchment areas, or models, are the standard way to represent the dominant locations that visitors to a town, place or centre travel from.

Why use them?

Use Catchment Areas to estimate the total addressable market for local shops or services based on the population of the catchment zone, and determine whether a site is a suitable location for investment. Catchment areas also link visitors to demographic data sources. This provides the means to characterise visitor populations and observe how they change with time.

◂ the map to the left shows shaded areas corresponding to the 20, 50 and 80% catchments for this centre for the year to date.

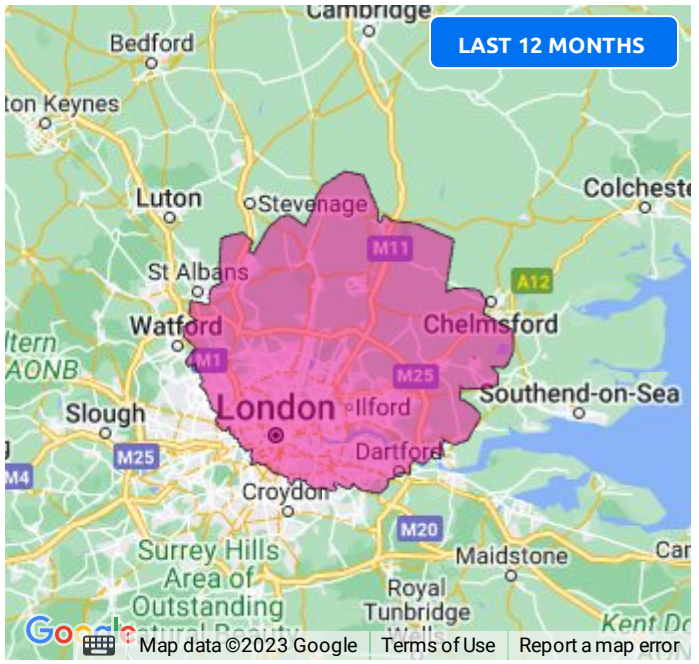
20% Catchment Area | Epping Forest

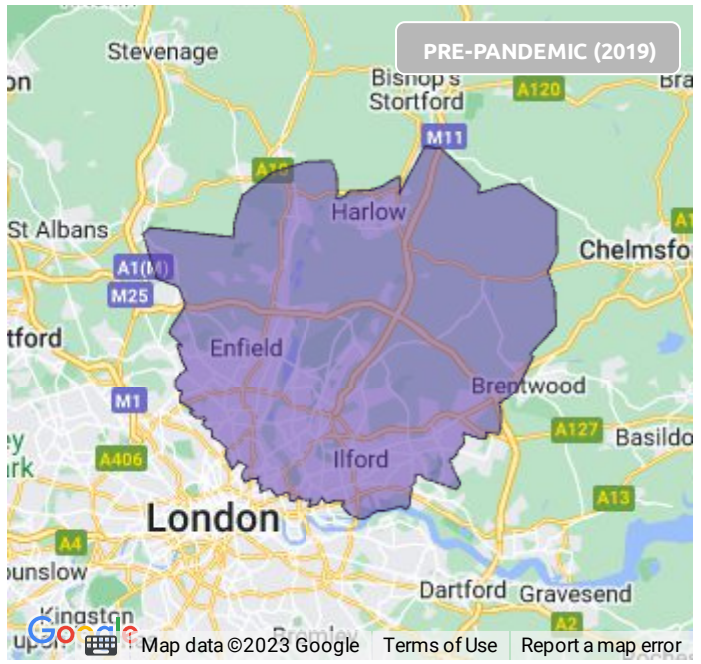


1.2m people lived within the 20% catchment in the 12 months from March '22-23

The 20% catchment represents the core of visitors to Epping Forest. Typically this group visits regularly for their everyday needs, commitments and leisure-time activity. In the 12 months to March 2023, that area represents a resident population of 1.2m. Compared to the 12 months prior, the 20% catchment has shrunk by 14% in terms of population coverage and stands at 36% more than it did in 2019, the last pre-pandemic year.

50% Catchment Area | Epping Forest





In the 12 months to March '23 6.8m people lived in the 50% catchment.

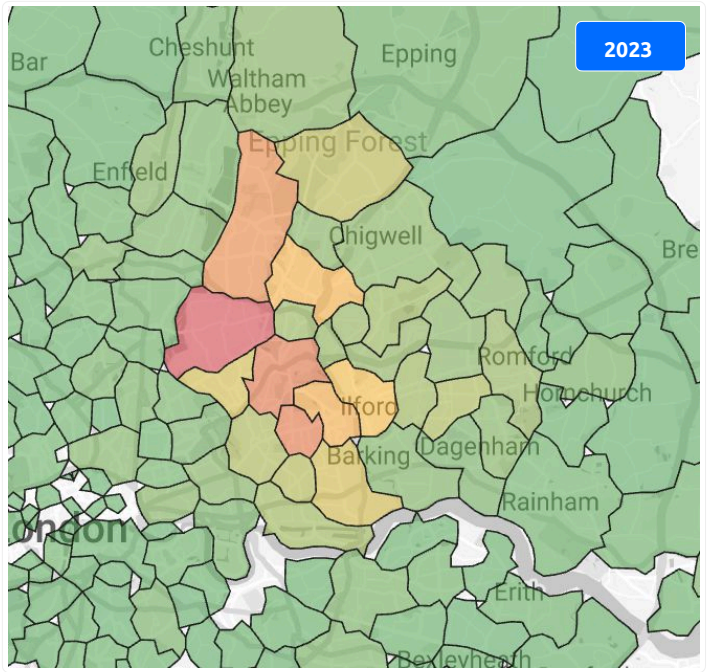
The 50% catchment represents the median of visitors to Epping Forest. This group is indicative of the average visitor, who will typically visit Epping Forest for a range of purposes including work, leisure, services and convenience. In the 12 months to March '23 that area represented a resident population of 6.8m and spanned a geographic area of 2.3m km². Versus the 12 months preceding, the 50% catchment population has shrunk by 14%. In this most recent period the 50% catchment for Epping Forest stands 171% greater than in 2019 - the last pre-pandemic year.

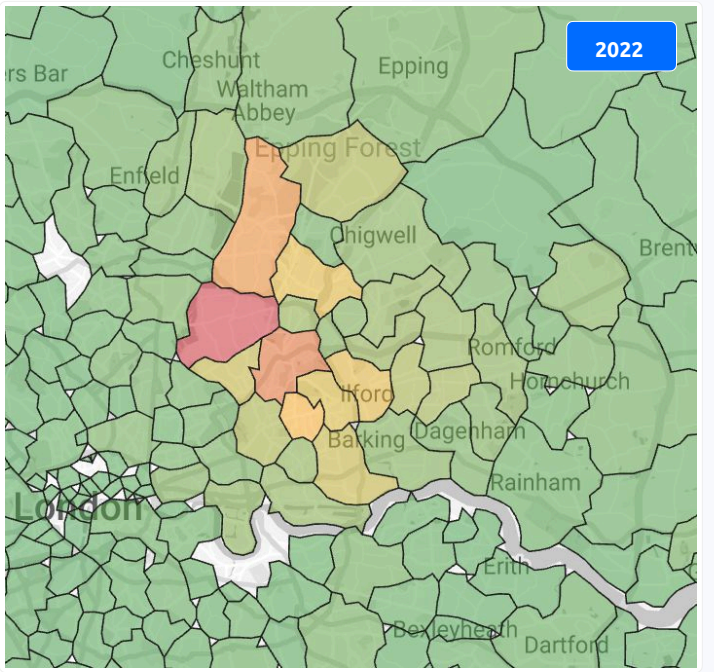
80% Catchment Area | Epping Forest

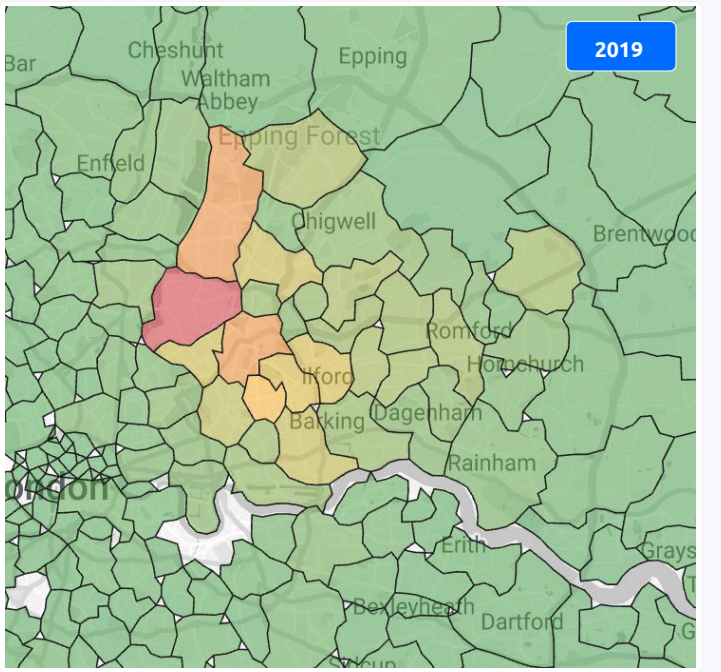
The 80% catchment has contracted by 3% since March '22

The 80% catchment is used to describe the majority of visitors, up to and including those who travel to Epping Forest occasionally; for work, visiting relations or as tourists. As a consequence, there are often seasonal influences on the 80% catchment although in this analysis we consider the year as a whole. In the 12 months to March '23 this area represents a resident population of 20.6m. The 80% catchment has shrunk by 3% against the 12 months preceding. This year, the 80% catchment for Epping Forest stands at 132% more than in 2019 - the last pre-pandemic year.

Quarterly Granular Catchment Maps | Epping Forest







12.6% of visitors are from Epping Forest Constituency postcodes in 2023 to date, up 2.9% on 2022

Using the granular catchment module, we can examine where visitors typically come from to visit Epping Forest. In 2023 to date, 12.6% of visitors were from postcodes within Epping Forest Constituency. This is up 2.9% on the previous year and up 2.1% on pre pandemic visitation, indicating that there has been an increase in more local visitation, although this may partially be due to seasonality in this year to date. The highest visitation in 2023 to date from within Epping Forest Constituency was from the E4 postcodes, with 4.4% visitation, up 0.5% on 2022.

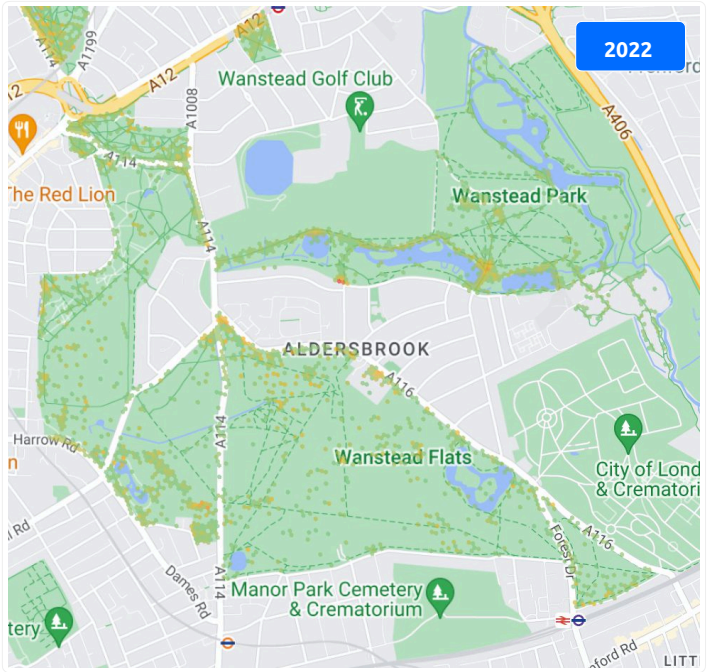
Quarterly Granular Catchment Data | Epping Forest

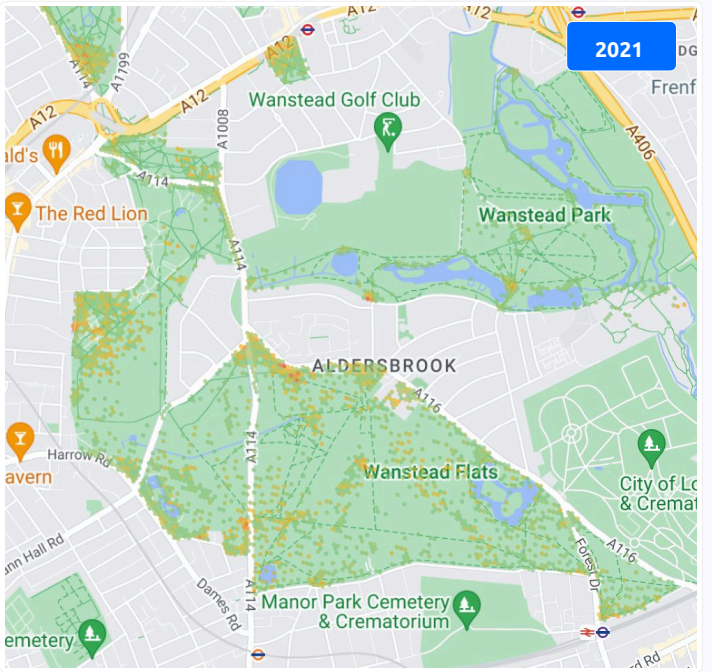
2023 Ranking	Postcode	2019 % Visitation	2020 % Visitation	% Change	2021 % Visitation	% Change	2022 % Visitation	% Change	2023 % Visitation	% Change
1	E17	7.9	5.9	-2.0	4.6	-1.3	5.7	1.1	5.9	0.2
2	E11	5.4	4.3	-1.1	3.6	-0.7	4.6	1.0	4.9	0.4
3	E7	4.2	3.6	-0.5	2.9	-0.7	3.1	0.2	4.9	1.8
4	E4	5.5	4.1	-1.4	3.2	-0.9	3.9	0.7	4.4	0.5
5	E12	3.2	2.7	-0.5	2.4	-0.3	2.3	-0.1	3.5	1.2
6	IG8	2.6	2.2	-0.4	1.6	-0.6	2.5	0.8	3.3	0.8
7	IG1	3.0	2.8	-0.3	2.1	-0.7	2.4	0.3	2.9	0.4
8	E10	2.7	2.0	-0.7	1.5	-0.5	1.9	0.4	2.2	0.3
9	E6	2.6	2.0	-0.6	1.5	-0.5	1.9	0.4	2.2	0.2
10	IG10	1.6	1.4	-0.2	1.4	-0.1	1.4	0.1	1.7	0.3
	Total	38.7	31.0	-7.7	24.7	-6.3	29.5	4.8	35.7	6.2

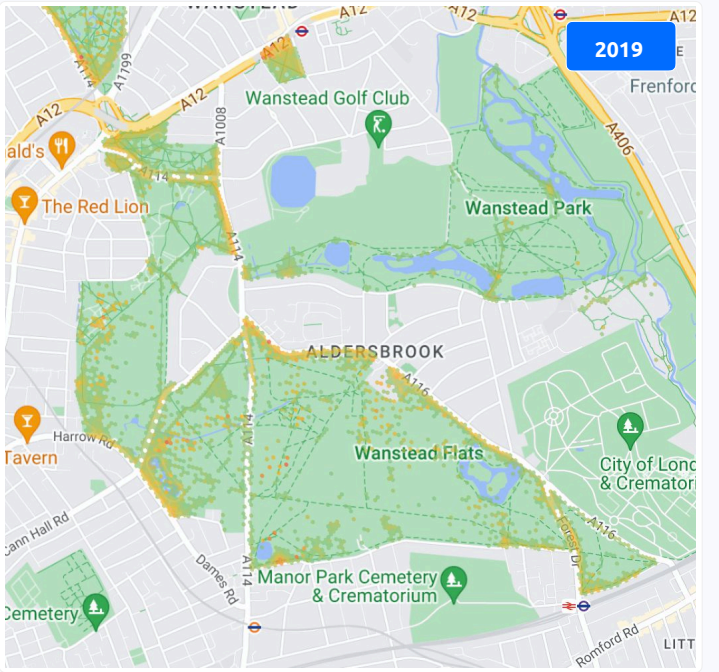
35.7% of visitation from the top 10 postcodes in 2023 to date, up 6.2% on 2022

Using data from the granular catchment module, we can assess which postcodes have the highest visitation and how this has changed across the last five years. In 2023, the postcode with the highest visitation so far has been E17, seeing a 0.2% increase on the previous year. The postcode with the biggest increase in 2023 to date is E7 with a 1.8% increase. We have seen a universal increase from these top 10 postcodes in 2023 to date, following a decrease in 2020, with a further decrease in 2021.

Density Maps: Wanstead Park/Flats | Epping Forest





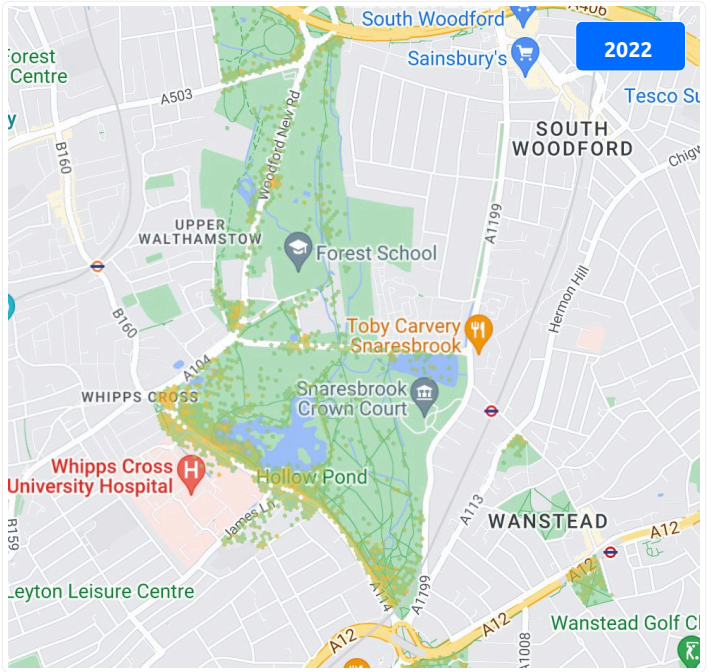


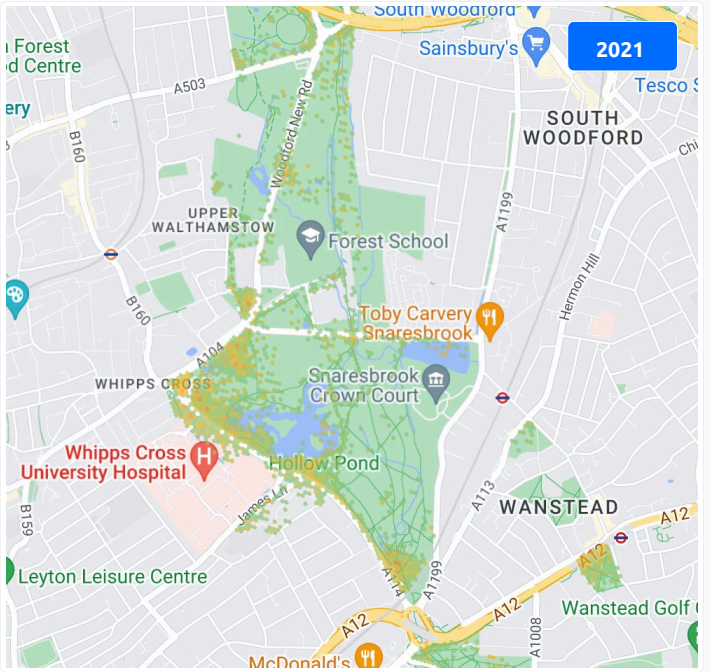
Density has became more focused in the Wanstead Flats area in 2022

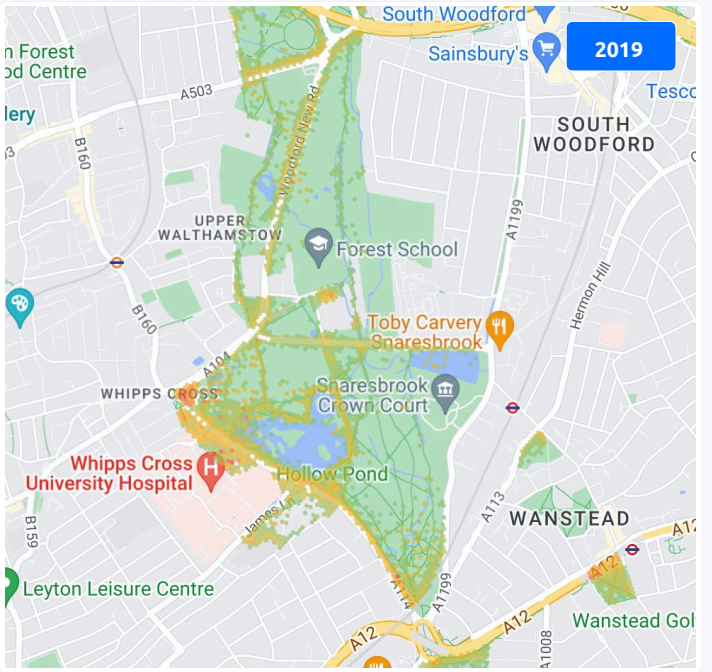
Examining the density maps for the Wanstead Flats area shows a decrease in density in 2022 when compared to the previous year and pre pandemic density. Particular areas of higher density include an area near Centre Road Car Park, near the Jubilee Pond Car Park and nearby pond, and near the Harrow Road Accessible Car Park and Pavilion. Car parks are often observed as areas of high density as they serve to act as a bottleneck of activity as people arrive and leave the area via a single point if visiting using a vehicle.

The Wanstead Park area sees particular areas of high activity near the Wanstead Tea Hut, which sees an increase in density when compared to previous years. We also see a hotspot near the Northumberland Avenue entrance, which has also seen increased density when compared to 2019. We also see high density in the north west of this area, particularly near the Henry Reynold Gardens, although less density is observed here when compared to pre pandemic.

Density Maps: Leyton Flats | Epping Forest





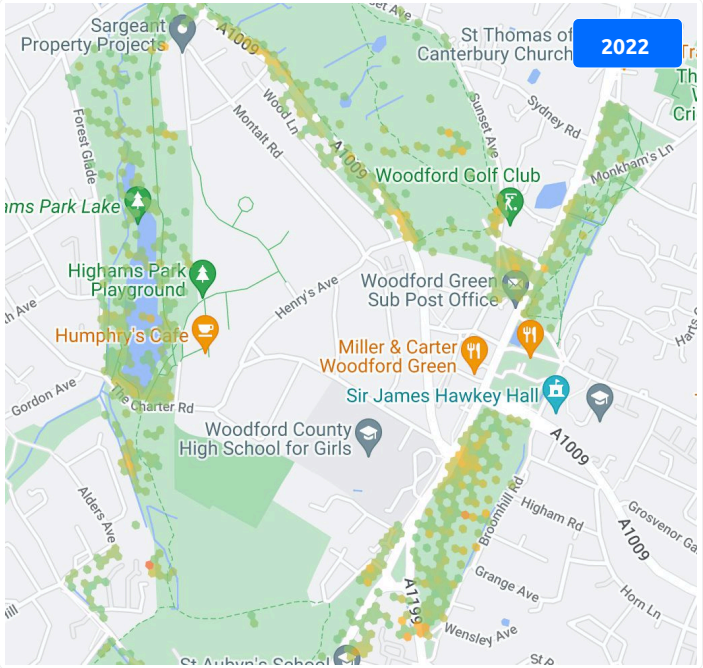


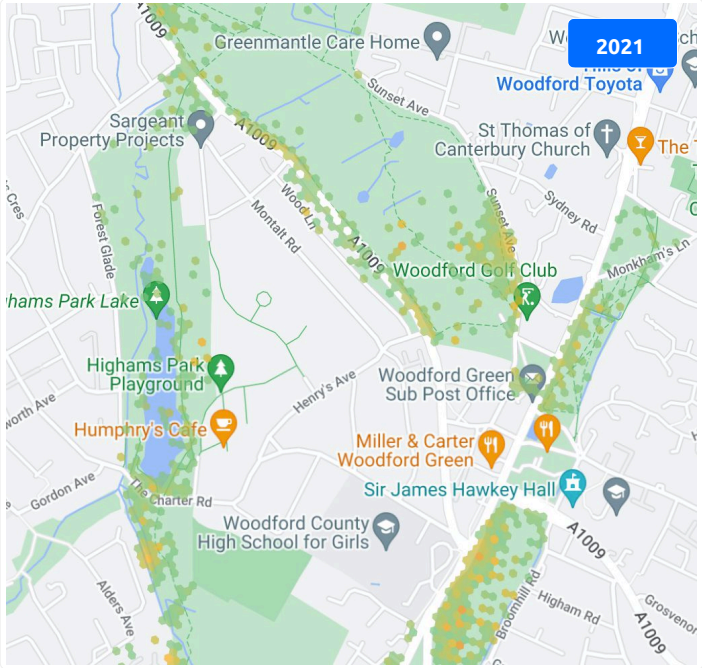
We have seen a decrease to density in Leyton Flats in 2022

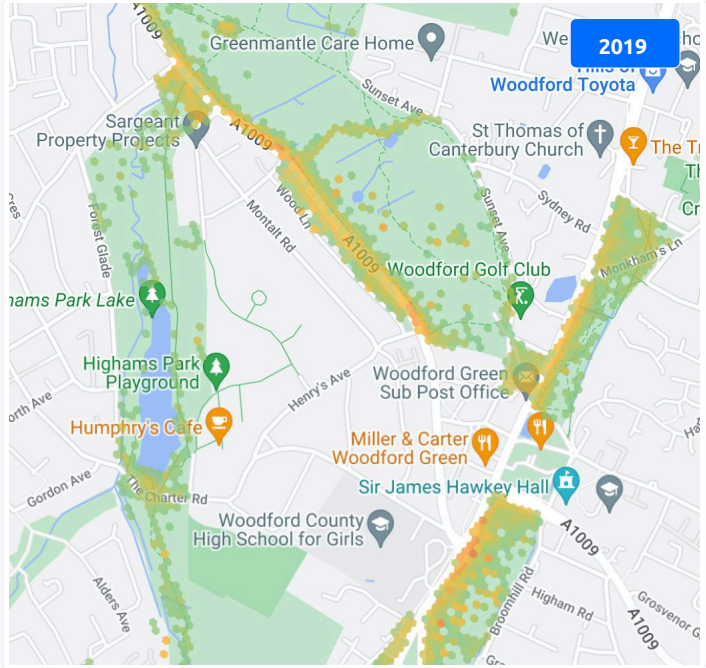
Examining the density maps for the Leyton Flats area shows a decrease in density in 2022 when compared to the previous year and pre pandemic density. Particular areas of higher density include the Lakeside Whipps Cross Diner, near Hollow Ponds Row Boat Hire and near the Whipps Cross Bus Stand. These areas have been focal points for activity across all compared years. In 2022 we see a particular decrease in activity in the area to the south of the A104, which saw much higher density in 2021.

We also see higher levels of density in the green space in-between St Peter's Ave, Woodford New Road and Forest Rise. This density is observed across all three periods and is likely used by pedestrians travelling through the area.

Density Maps: Highams Park/Woodford | Epping Forest



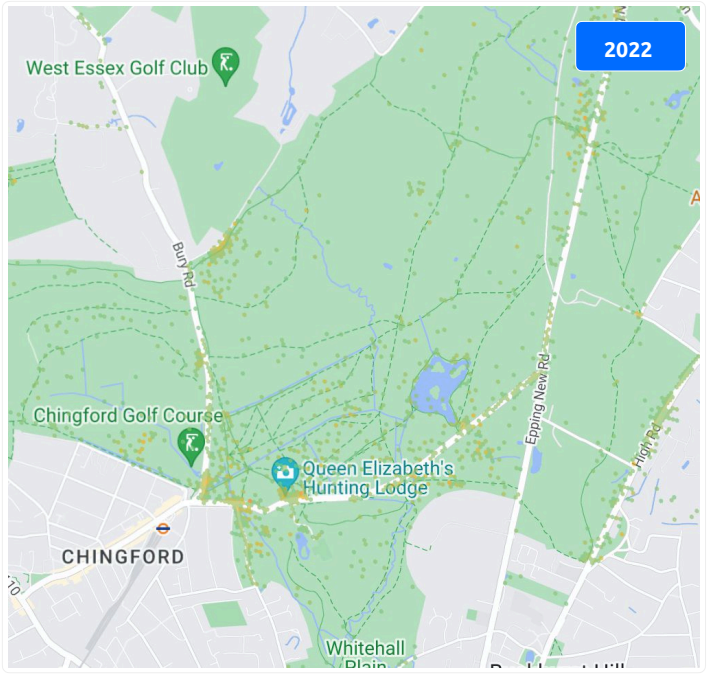


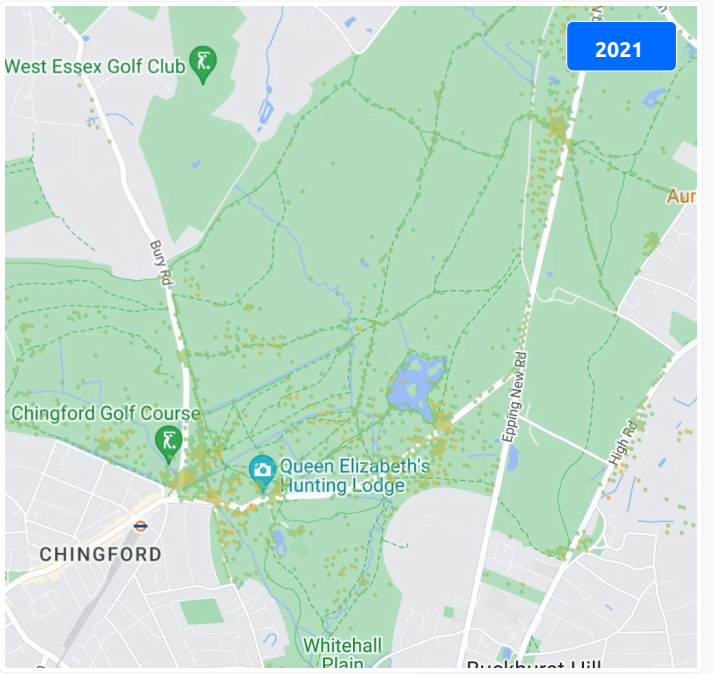


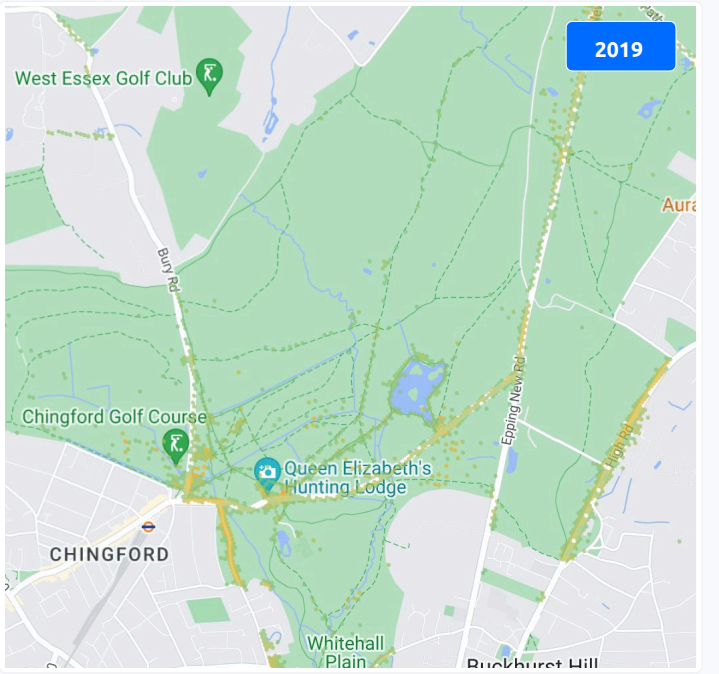
We have seen a small increase to density in Highams Park 2022

Examining the density maps for the Highams Park area shows a small increase in density in 2022 when compared to the previous year and pre pandemic density, although with slightly less density observed near The Boathouse. We also see higher density near the Potato Pond on Woodford Green and at the car park near Woodford Green Primary School and the Woodford Golf Club. Density near the Potato Pond has increased when compared to 2021.

Density Maps: Chingford Plain | Epping Forest



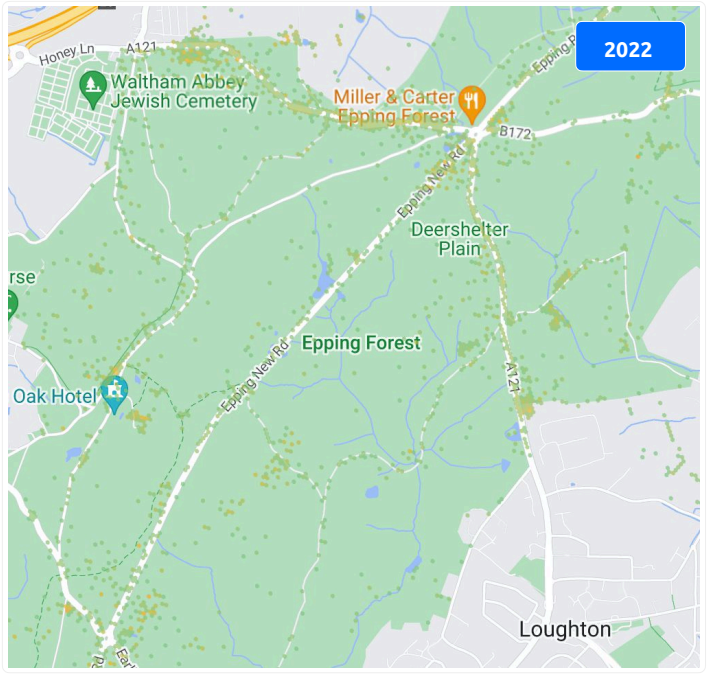


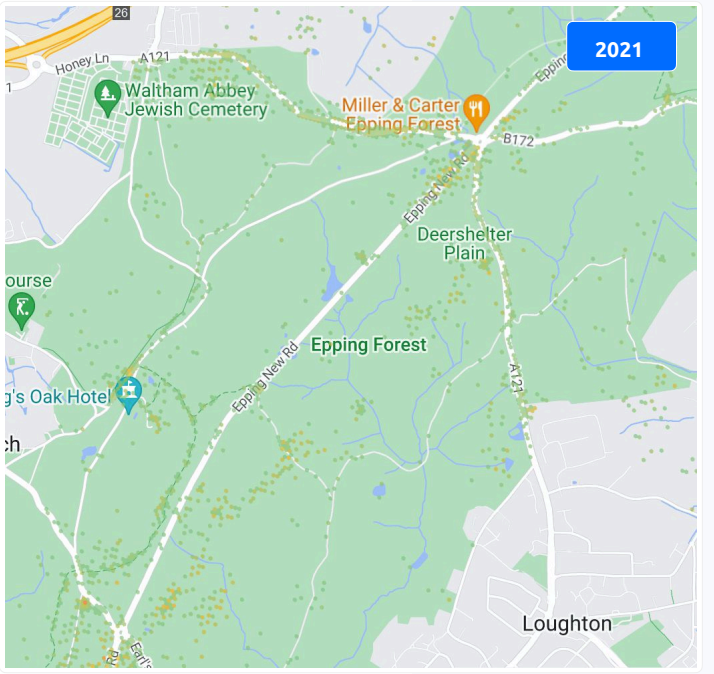


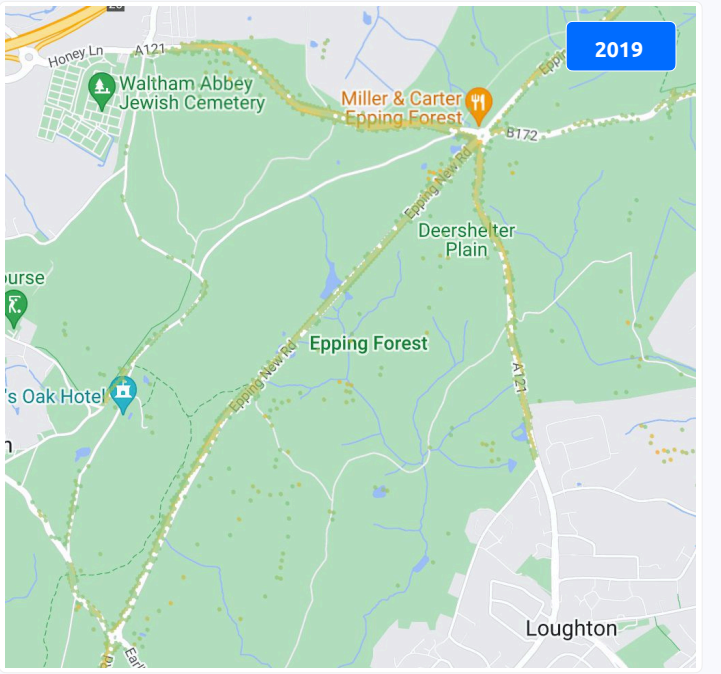
There has been an wider spread of activity in Chingford Plain in the last two years

Examining the density maps for the Chingford Plain area shows a wider spread of density in 2022 when compared to pre pandemic, with activity reaching further from the paths and roads than previously seen. We see a decrease in activity at the Connaught Water Car Park when compared to the previous year, although this location still sees a fair amount of activity. Other particular hotspots in this area include the Butlers Retreat cafe on Ranger's Road, Queen Elizabeth's Hunting Lodge and the Chingford Golf Course Car Park. The Cafe and Hunting Lodge area has seen an increase to density in the last year, although remains less dense than pre pandemic.

Density Maps: Epping Forest | Epping Forest



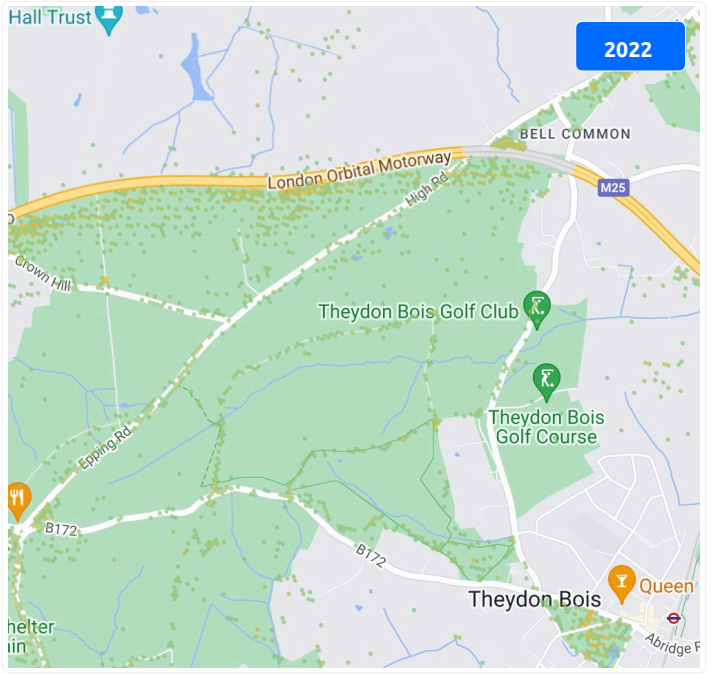


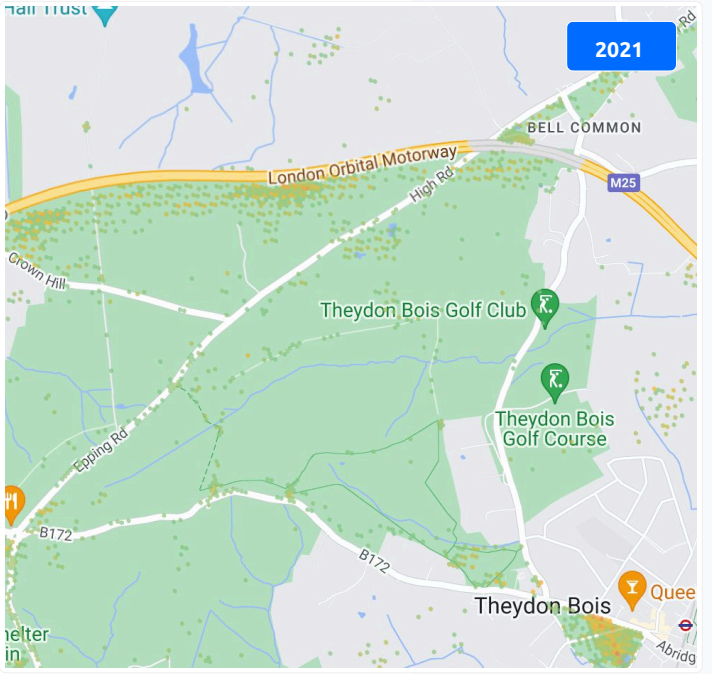


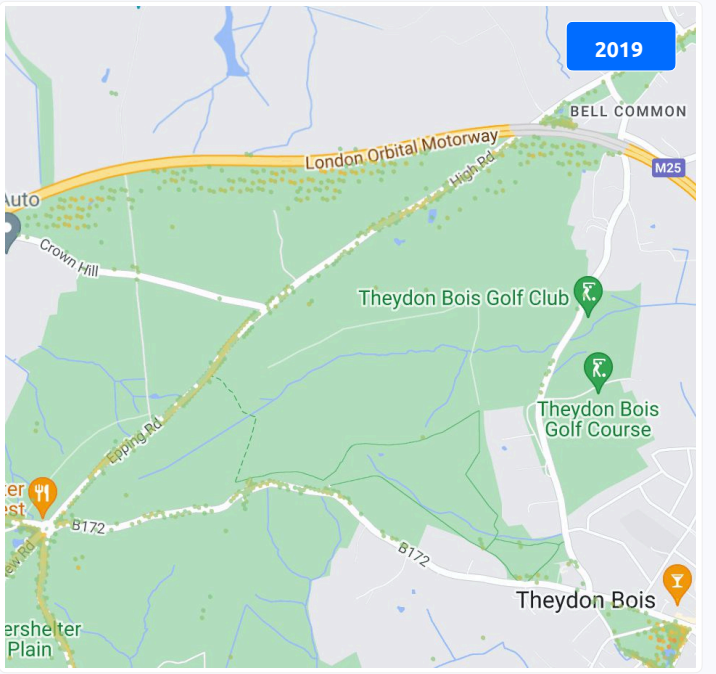
There has been an wider spread of activity in Epping Forest in the last two years

Examining the density maps for the Epping Forest area shows a wider spread of density in 2022 when compared to pre pandemic, with activity reaching further from the paths and roads than previously seen. We see particular areas of high activity near the Epping Forest Visitor Centre at High Beach, and the nearby Mandy's Tea Hut High Beech Kiosk. The Visitor Centre in particular has seen increased activity when compared to previous years. We also see high density to the north of the area, particularly along a path that runs alongside the A121.

Density Maps: Theydon Green/Epping Forest | Epping Forest



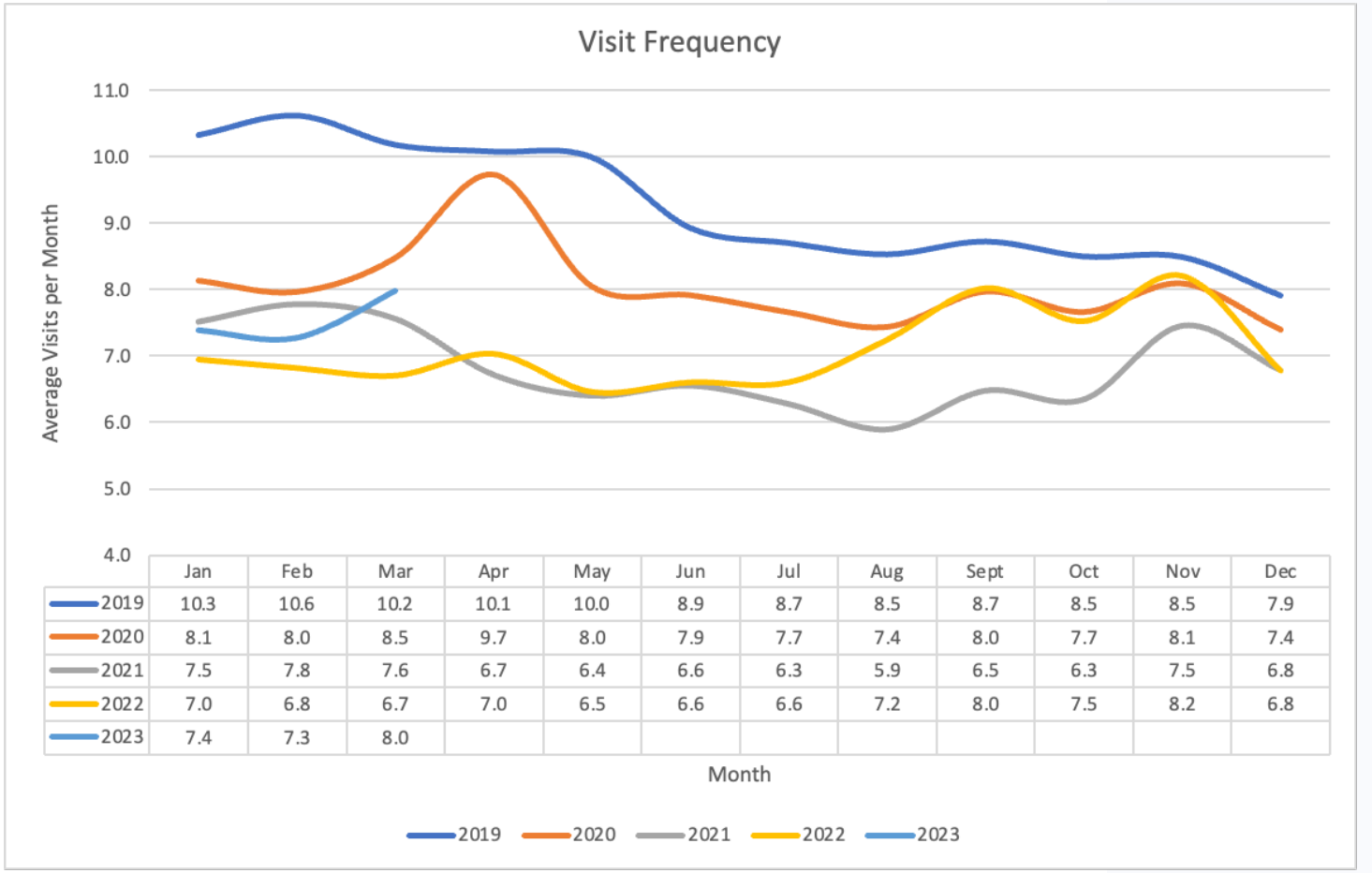




There was a reduced in density at Theydon Green in 2022

Examining the density maps for the Theydon Green area shows a decrease to density in 2022 when compared to the previous year. Across the other areas of Epping Forest we see an increase to density along several of the roads running near to Ambresbury Banks when compared to both previous periods. We see similar levels of activity to the north of the area when compared to the previous year, with an increase on pre pandemic activity in this area.

Visit Frequency | Epping Forest



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2019	10.3	10.6	10.2	10.1	10.0	8.9	8.7	8.5	8.7	8.5	8.5	7.9
2020	8.1	8.0	8.5	9.7	8.0	7.9	7.7	7.4	8.0	7.7	8.1	7.4
2021	7.5	7.8	7.6	6.7	6.4	6.6	6.3	5.9	6.5	6.3	7.5	6.8
2022	7.0	6.8	6.7	7.0	6.5	6.6	6.6	7.2	8.0	7.5	8.2	6.8
2023	7.4	7.3	8.0									

Average visit frequency at 7.5 in 2023 to date, up 0.7 on the same period in 2022

Using the visit frequency module, we can see how often visitors to the area are observed returning to the area on average within each month.

In 2023, we see an average visit frequency of 7.5, this is up 0.7 on the same period in the previous year, with a particular increase observed in March. The highest frequency last year was observed in November, at 8.2 and the lowest was observed in May at 6.5.

We see visit frequencies generally remaining lower when compared to pre pandemic levels, with an initial decrease in 2020 (albeit with a spike coinciding with the first Covid lockdown, likely due to increased visits from the local population during Covid restrictions). 2021 saw a further fall to visit frequency, although we saw a significant increase in the latter half of 2022.

PLACE PERFORMANCE REPORT

Thank you for reading

Huq's Customer Success programme is the human side of our platform - making sure our insights deliver the evidence to support your goals and ensure your success. We help you to use Huq's place insights; how to interpret the data and manipulate visualisations to demonstrate key points; to produce reports and shareable work products.

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