

TOMORROW, TODAY

18th - 20th
AUGUST 2020 - Dr Steve Millington



Supporting people who serve places



High Streets Task Force

The IPM and PwC
leading a national
consortium to support
places in England

www.highstreetstaskforce.org.uk



**HIGH
STREETS
TASK
FORCE**

What do festivals do?



Transformative of
people and places

Social cohesion

Visitor numbers

Consolidation of
civic identity

Economic,
social and
cultural impact
of festivals

Synergy with local
business

Cultural inheritance

Improved place
awareness and perception

...festivals have been historically construed as mechanisms through which place-based communities express identities, celebrate communally held values and strengthen communal bonds

Quinn, 2005, 935

'Squibbers' at the Bridgewater Carnival

No reason why festivals cannot continue to bring these benefits to places – however - festival organisers face a number of challenges ...



How has COVID affected our high streets and town centres?

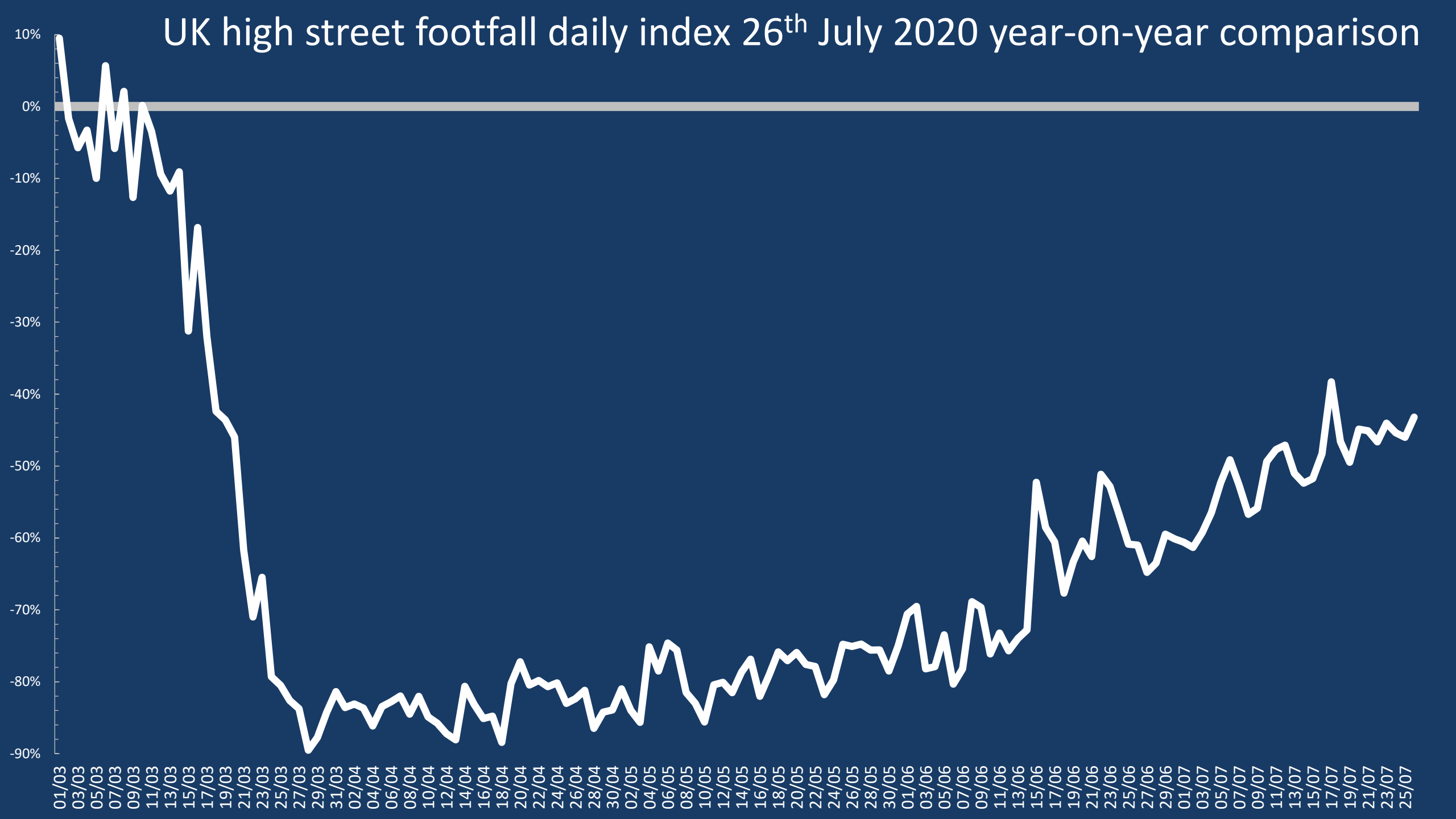
The wider context!



#1 Footfall



UK high street footfall daily index 26th July 2020 year-on-year comparison

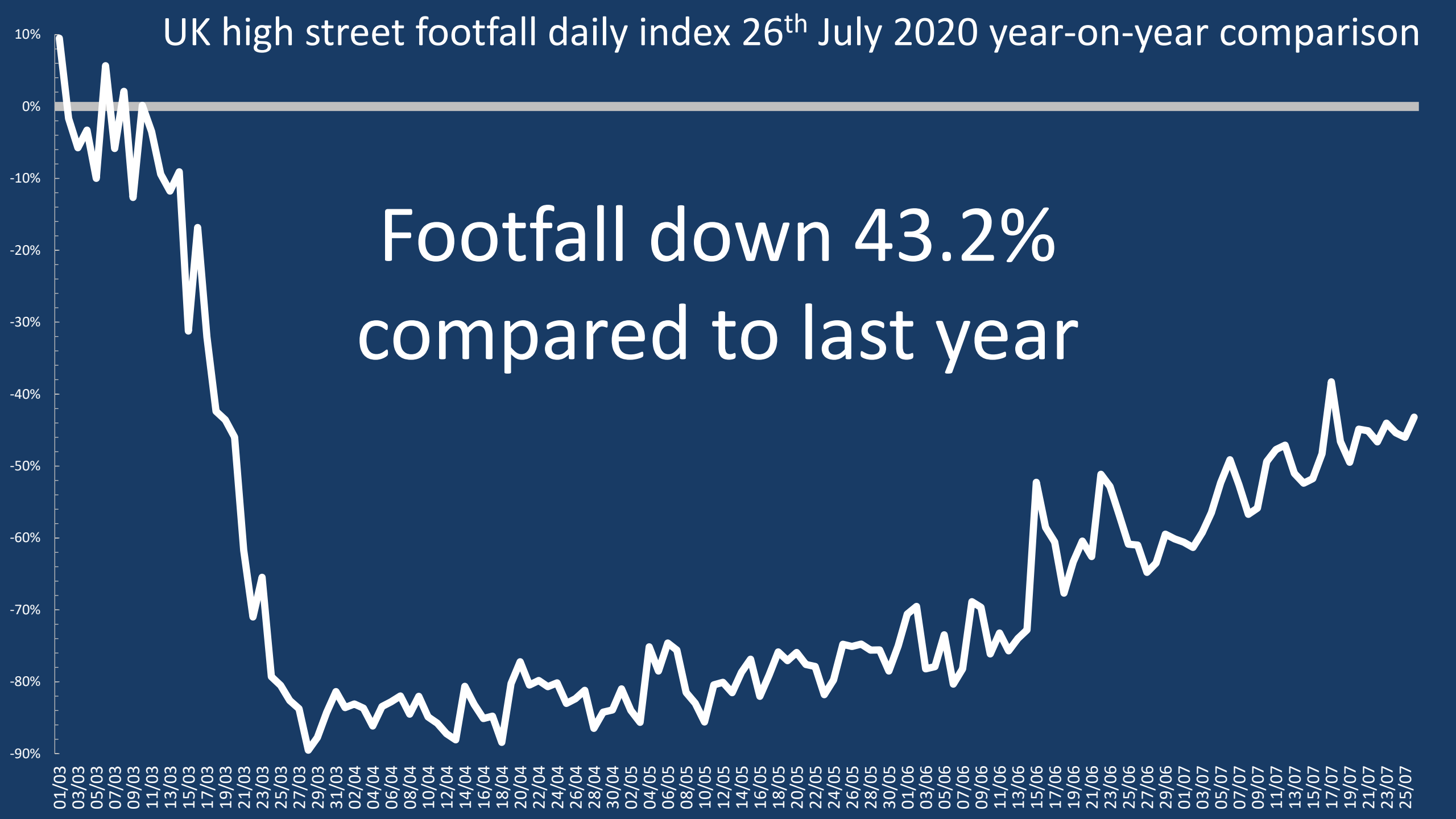


UK high street footfall daily index 26th July 2020 year-on-year comparison



UK high street footfall daily index 26th July 2020 year-on-year comparison

Footfall down 43.2%
compared to last year

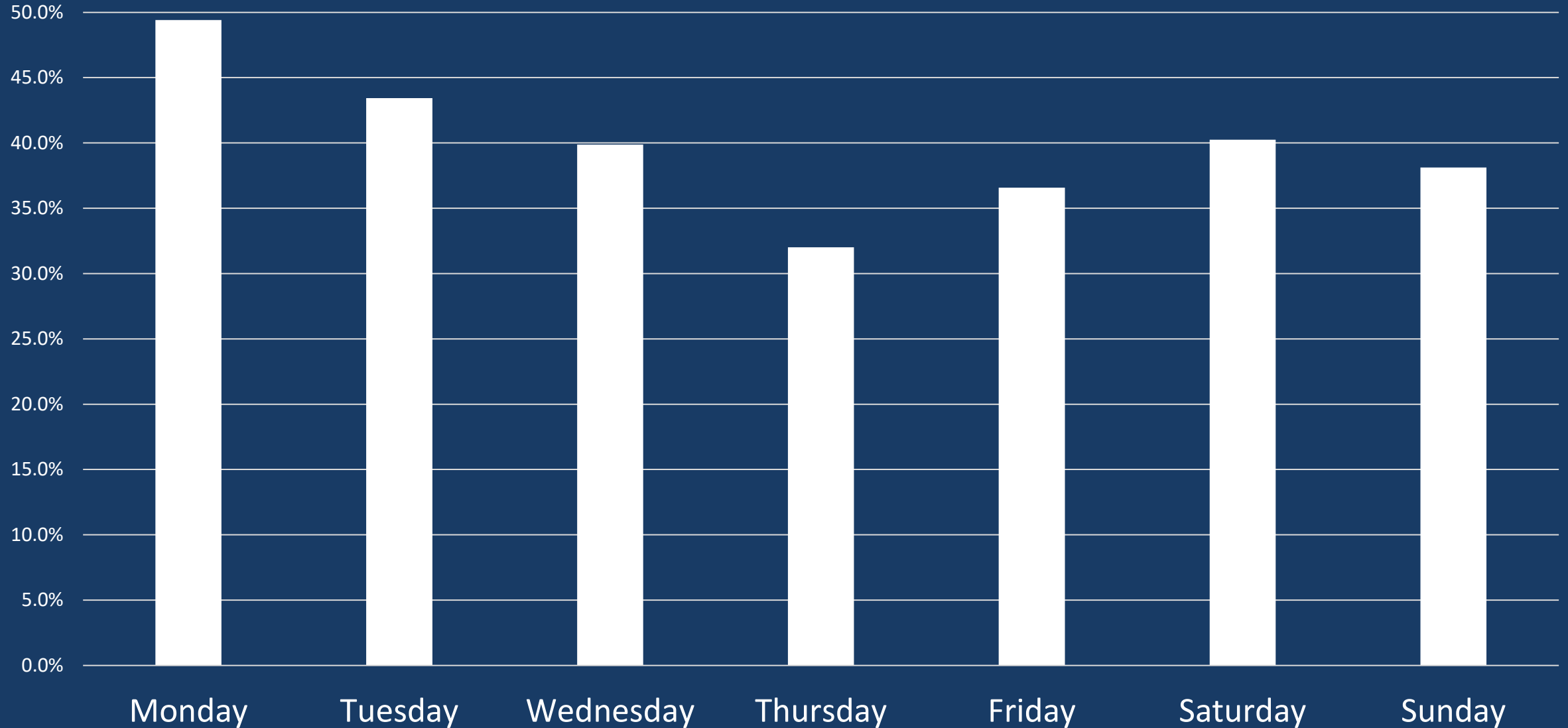


Picture is not uniform across days,
regions or types of towns



Daily recovery footfall in England (15th June- 21st June)

% of last year's footfall volume

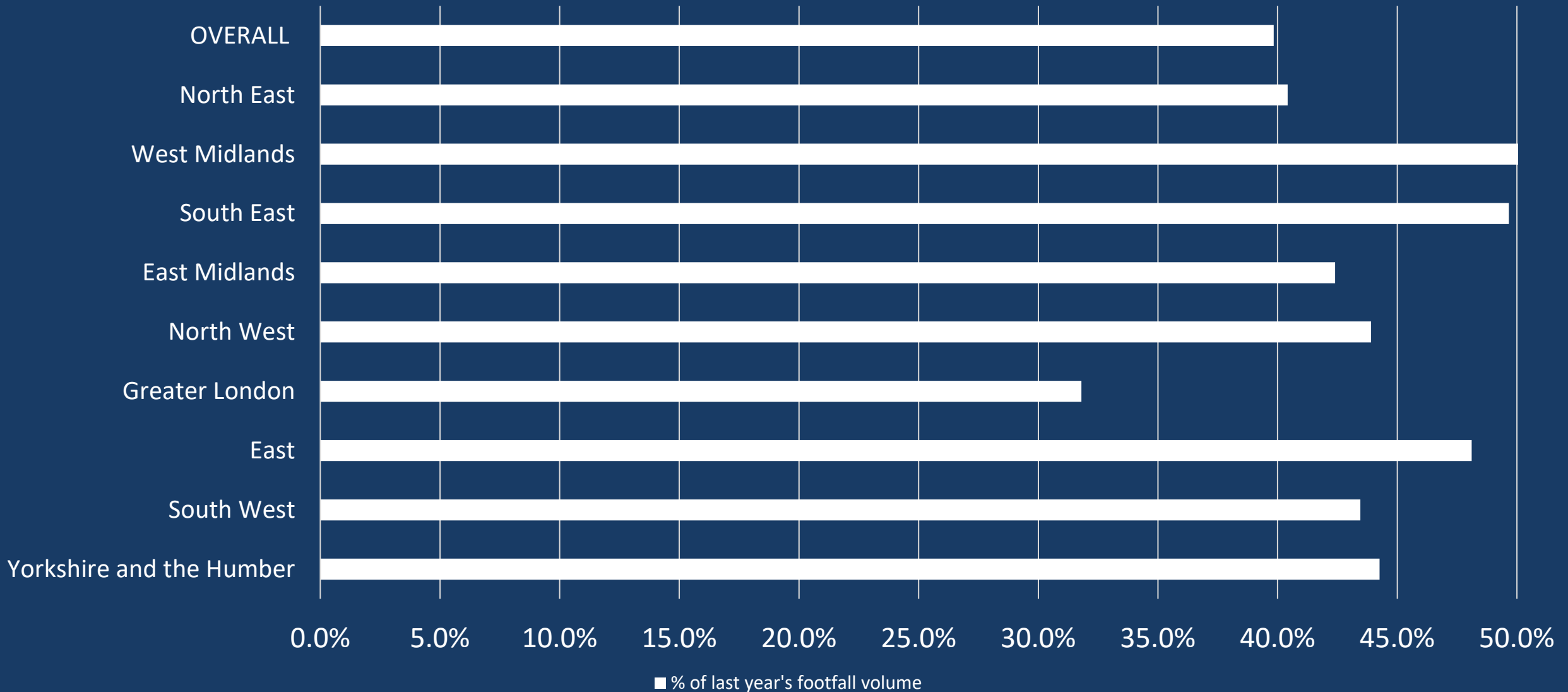


With many people working at home is
Monday becoming the new Saturday?



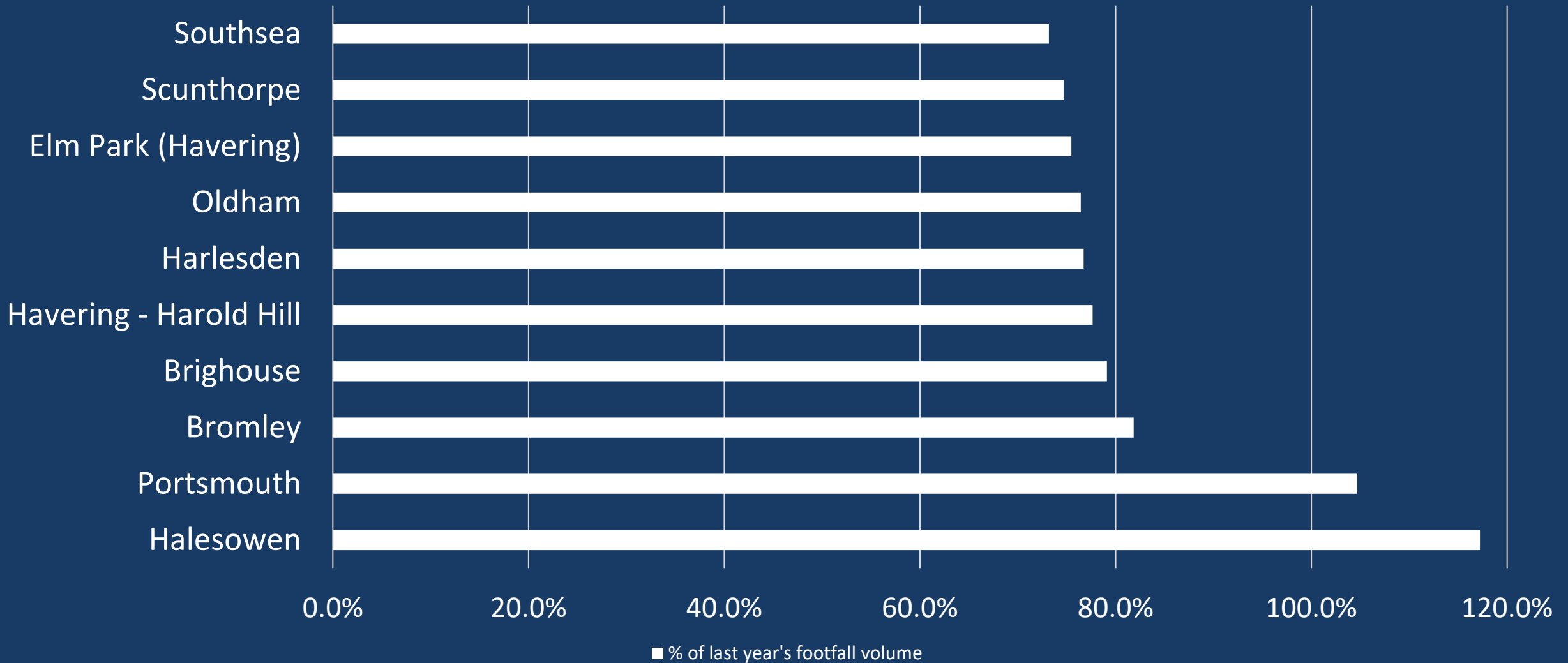
Footfall recovery across English regions for week Monday 15th June – Sunday 21st

% of last year's footfall volume



10 English towns with the highest footfall recovery (15th-21st June) compared with same period last year

% of last year's footfall volume





70% recovery

- Seaside towns
- Smaller, multifunctional towns



30% recovery

- Large cities where employees and students have not returned
- Inland tourist towns where attractions remain shut

Understand your place!

National averages hide significant local differences



However, before lockdown town centre footfall was declining anyway ... due to Out-of-Town retailing and online shopping

Long term change appears to have accelerated under lockdown





Health



Fitness



Leisure



Entertainment

A desire for non-retail things



Downtown housing



Eating out



Culture events

Places need new functions to replace retail!

Check out the IPM report - www.highstreettaskforce.org.uk/resources/details/?id=09c6d17d-3dof-4d43-a401-3fd220b4d105

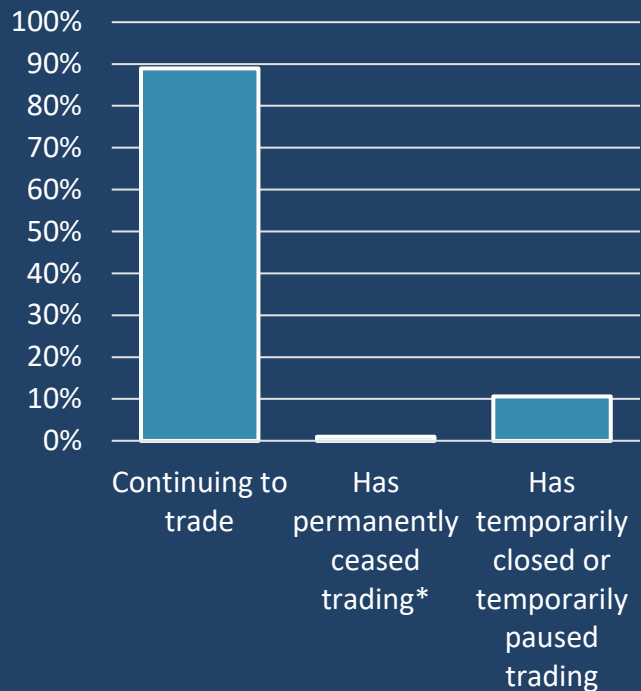


#2 Business impact and resilience

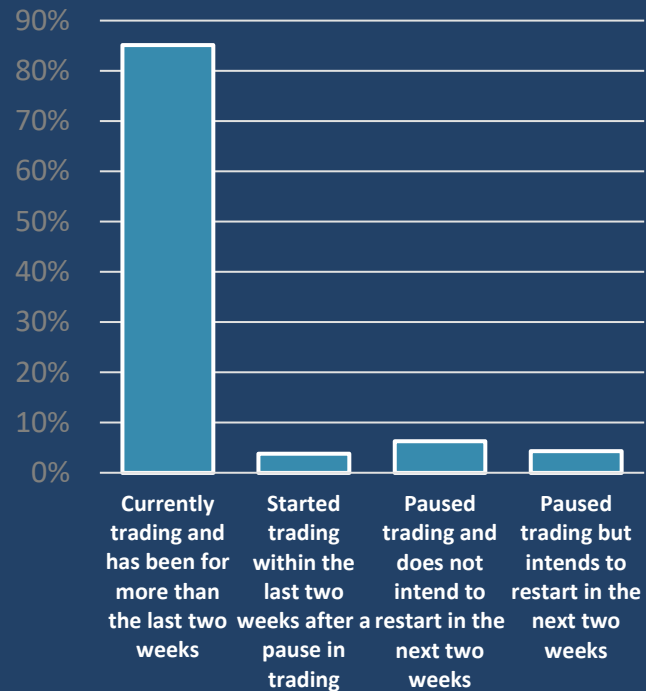


Business Impacts of COVID-19

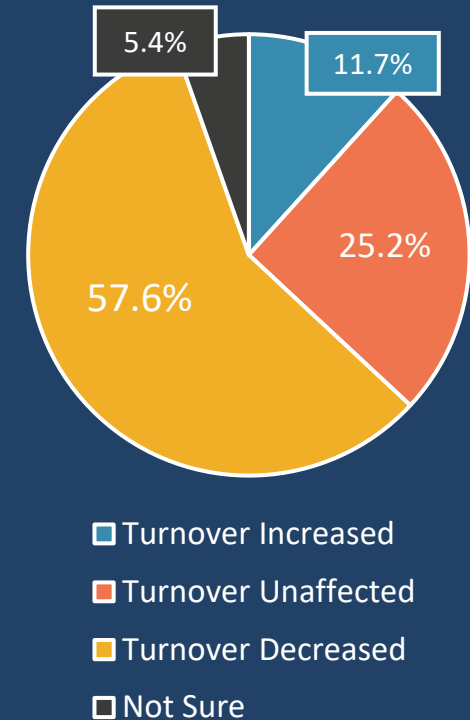
Businesses Trading: Overview



Businesses Trading: Status



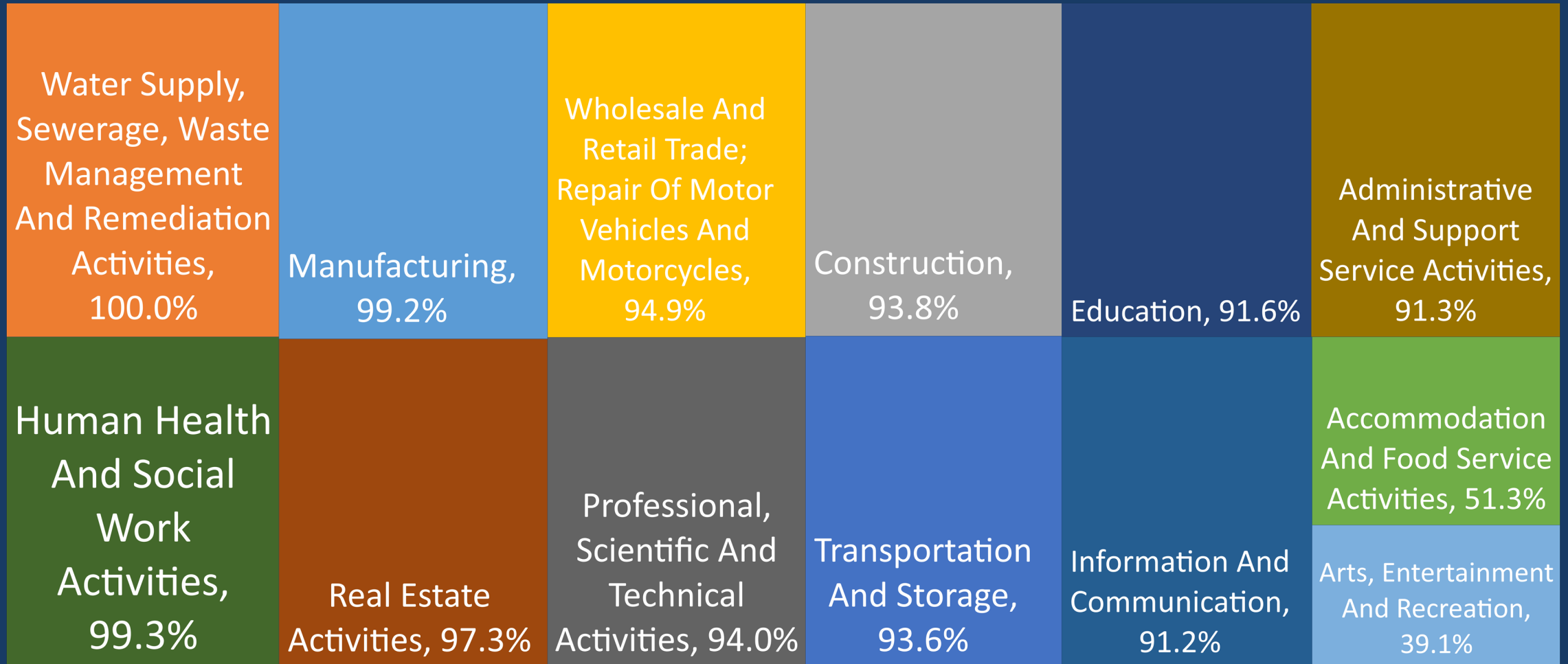
Turnover



15th June to 28th June

Source : [ONS](#)

Businesses continuing to trade



15th June to 28th June (n=5,527)

Source : [ONS](#)

Business Resilience Composite Score per Business Sector



FIGURE A: BAR CHART SHOWCASING THE BUSINESS RESILIENCE COMPOSITE SCORE PER BUSINESS SECTOR USING THE RAG REPORTING SYSTEM

Arts, Entertainment and Recreation reporting 53% decline in turnover – the highest of any sector

15th June to 28th June (n=4,911). Source: ONS



Arts, Entertainment and Recreation reporting 72% of staff furloughed – the highest of any sector

15th June to 28th June (n=5,527). Source: ONS



79% of Arts, Entertainment and Recreation organisations reporting increased operating costs

15th June to 28th June (n=5,527). Source: ONS



Important festival organisers
begin to embed resilience into
their events ...





Brooklyn Park



Gisburne Park Pop-Up



Gisburne Park Pop-Up



Berghain club, Berlin



Georg Schutz drive-in cinema, Dusseldorf



Paddington - Merchants Square Floating Cinema



Some considerations ...



High Streets Task Force

Managing social distancing in public space

<https://www.highstreetstaskforce.org.uk/resources/details/?id=8e83cf1d-2c81-45c0-be9e-8c8d48aeb908>



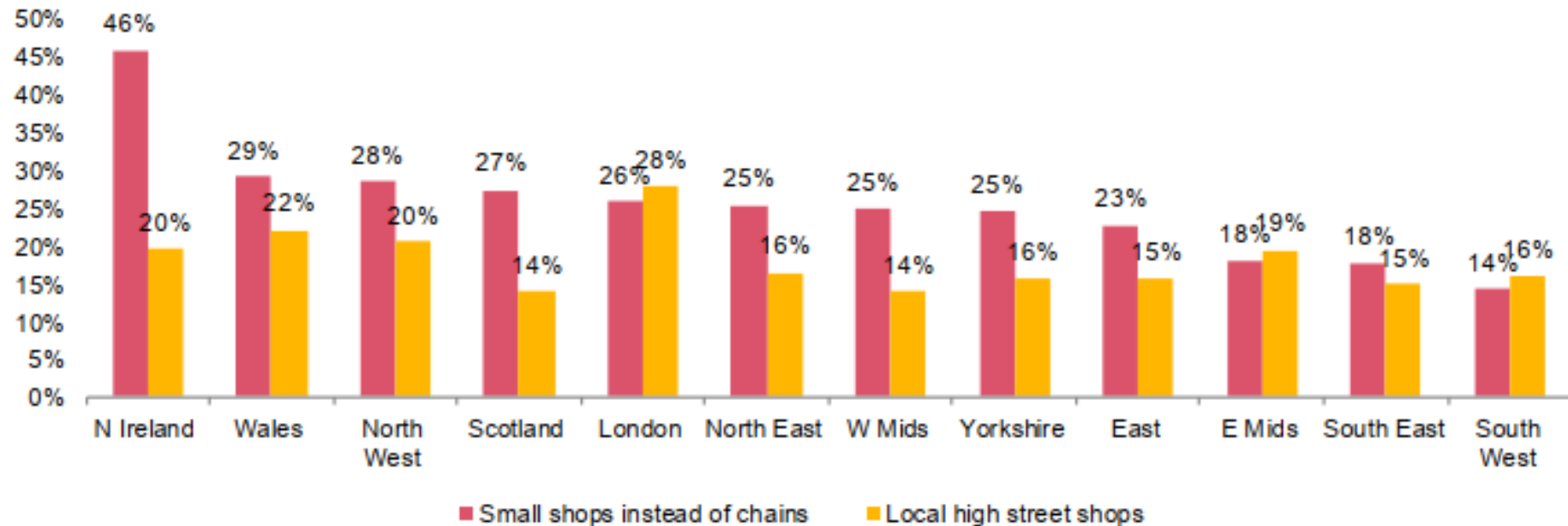
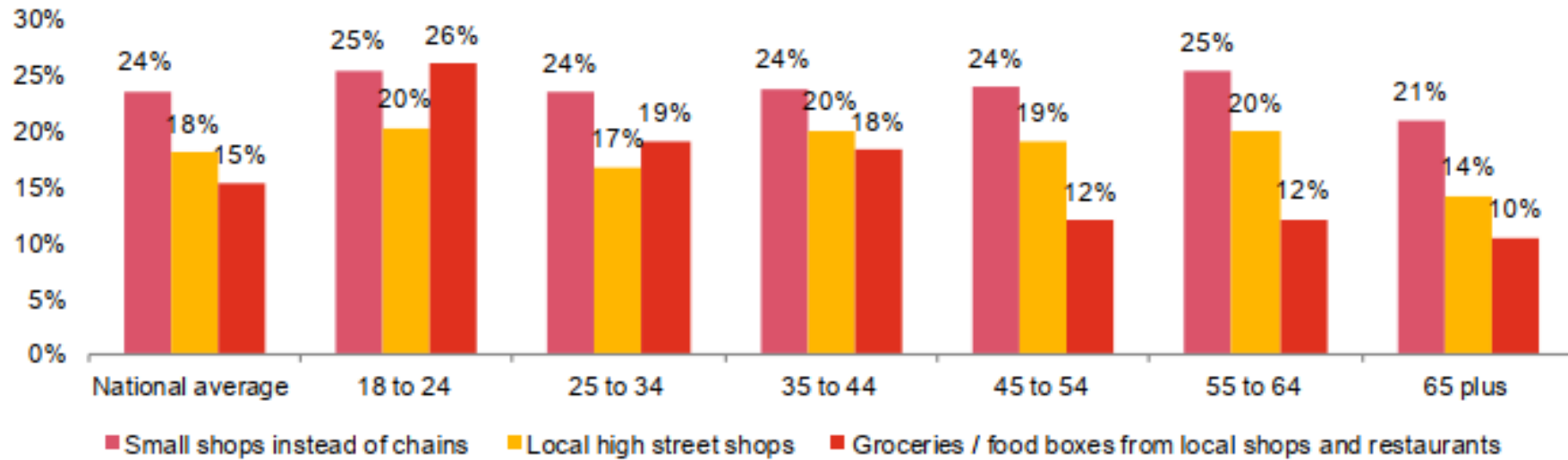
**HIGH
STREETS
TASK
FORCE**

#3 Consumer sentiment



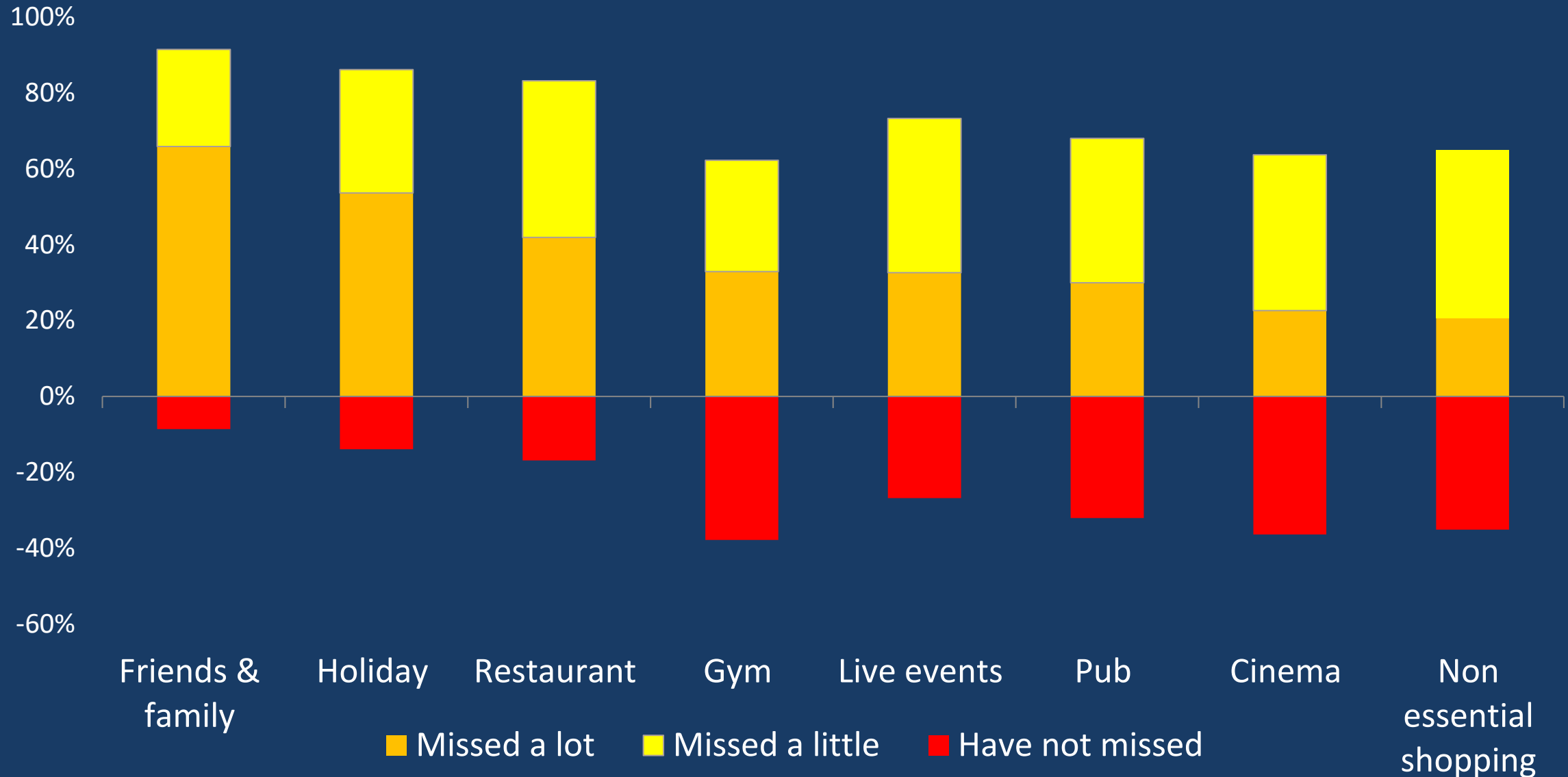
"As a result of the Coronavirus restrictions, have you bought more from any of the following?"

Shopping **LOCALLY** since lockdown



How much consumers have missed leisure and retail activities, Jun 2020

"Have you missed these activities during the COVID-19 restrictions?"



Despite sentiment remaining below a post-election high at the end of 2019, it is still higher than during the 2008-09 recession and the 2011-13 austerity period



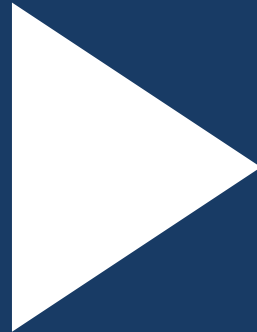
#4 importance of social media in engaging audiences and customers



Despite over 3.2 billion consumers now spending over 3 hrs per day on social media:

Pre COVID 19

- 43% of independent businesses active on social media on a daily basis
- 68% of national businesses active on social media on a daily basis



Post COVID 19

- In some towns, only:
 - 5% of independents are active
 - 26% of national businesses active

Research with a range of independent businesses shows that those that engage well on social media also trade well

Maybe* (July, 2020)



Use social media to communicate and listen!



In summary ...

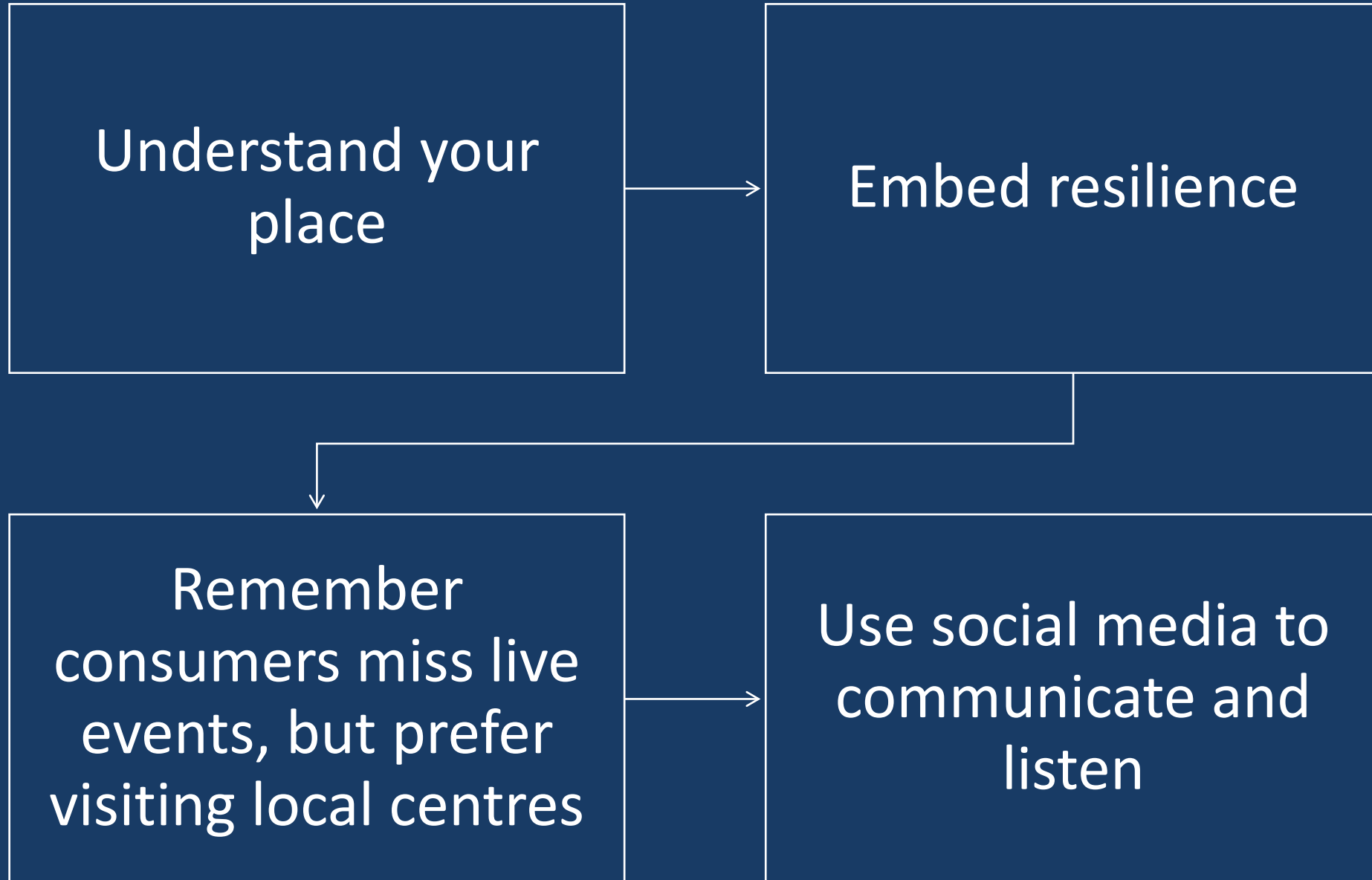


Understand your
place

Embed resilience

Remember
consumers miss live
events, but prefer
visiting local centres

Use social media to
communicate and
listen



Festivals and events are important to both recovery and long term fortunes of high streets and town centres



What you can do next ...





High Streets Task Force

Recovery Framework

<https://www.highstreetstaskforce.org.uk/covid-19-recovery/>

**HIGH
STREETS
TASK
FORCE**



Register your interest in the High Streets Task Force

www.highstreetstaskforce.org.uk/register/

**HIGH
STREETS
TASK
FORCE**