



DIANE WEHRLE

Marketing & Insights Director

How customer
behaviour is changing

www.spring-board.info



SPRINGBOARD

Data and insights on customer activity, and store and retail destination performance

- Footfall and sales
- Retailers and retail centres
- Continuous, immediate data
- Complete retail bricks & mortar landscape



High Streets



Shopping Centres



Out of Town

Coverage of the bricks & mortar retail landscape

1492 footfall counting locations

411 shopping sites across the UK

120 million footfall counts per week

UK coverage England, Scotland, Wales, NI

93% correlation to spending

16 years of data since 2002



Some organisations who work with us



INSPIRED LEADERS
SHAPING CITIES



The Fragrance Shop

Card Factory



Look out for our data and comment in the media



The Daily Telegraph

Leaving could benefit footfall on Britain's high streets in the short term



sky NEWS



Register on our website to receive our insights



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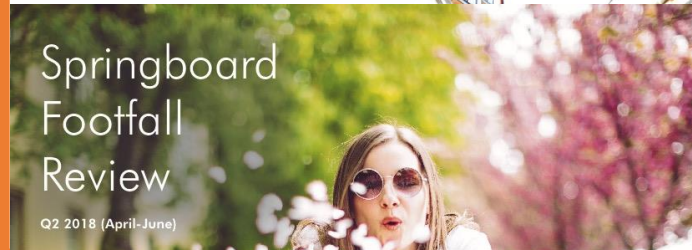
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springboard research



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What footfall tells us about customer behaviour

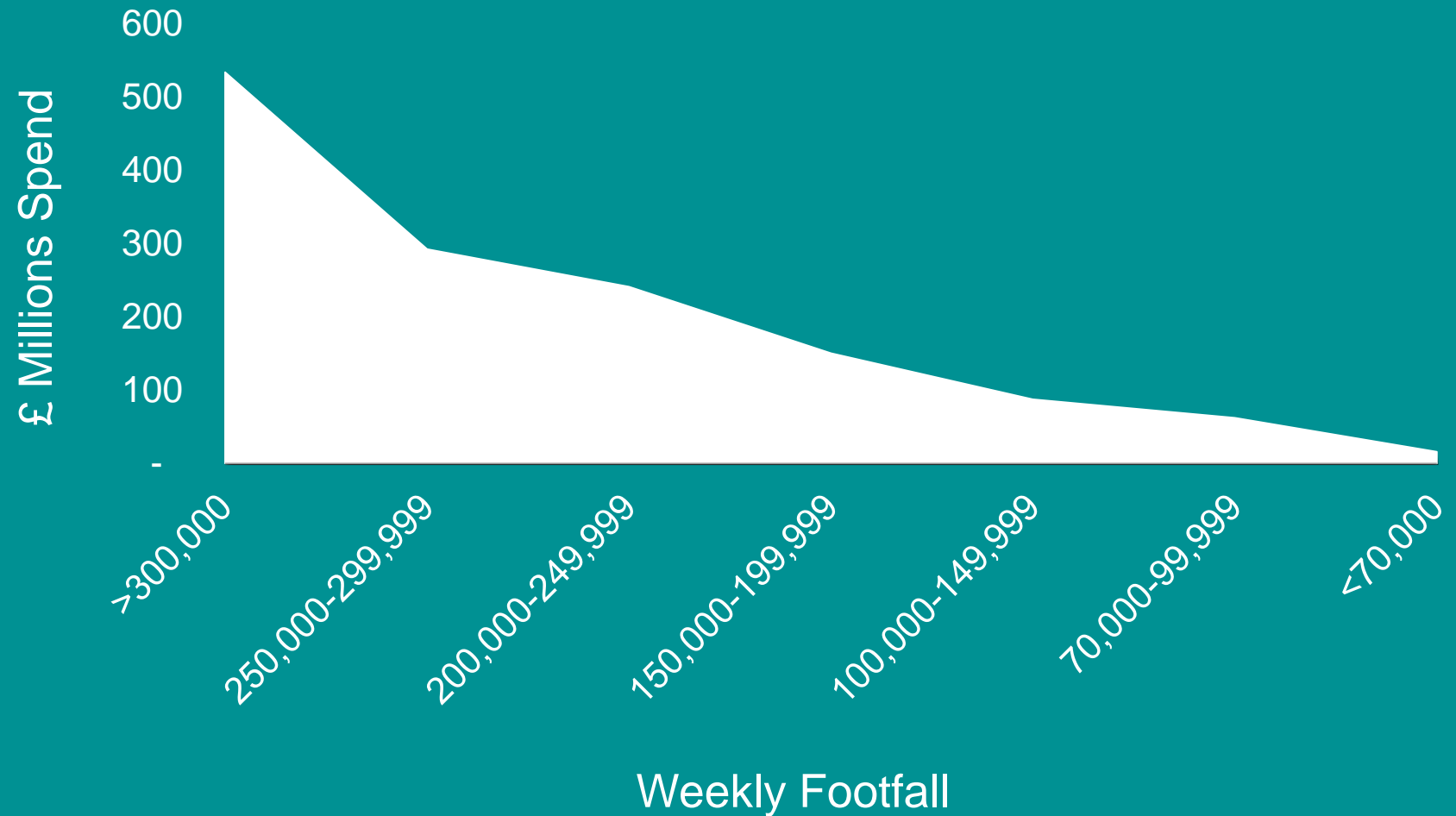


What footfall tells us about customer behaviour

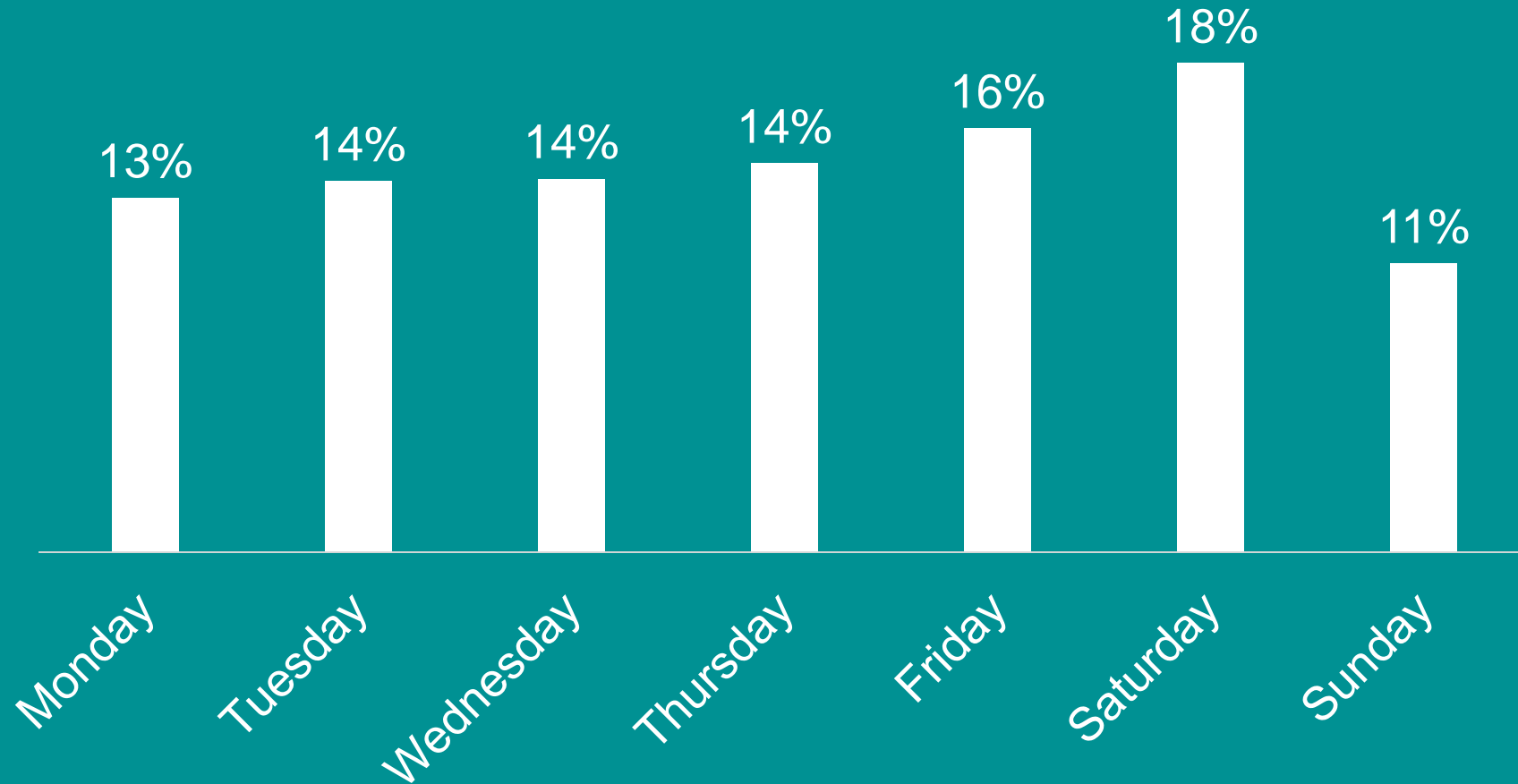
- Relationship of footfall to sales
- When customers shop
- The success of stores in attracting customers



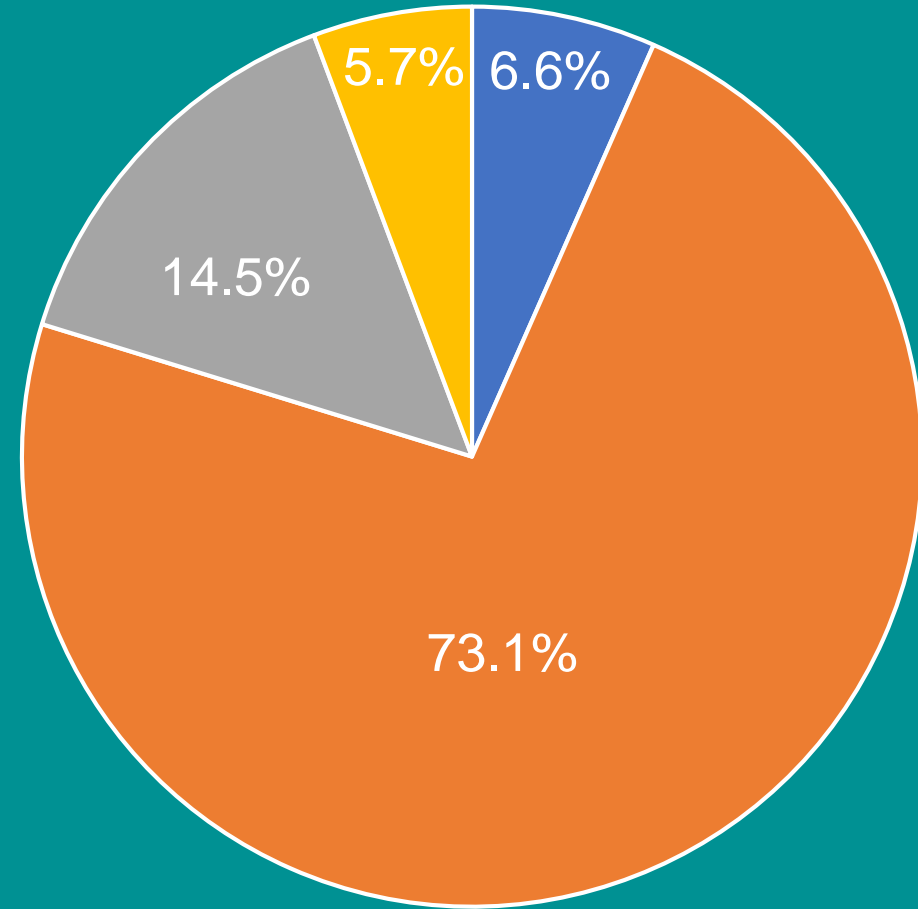
Relationship of footfall to sales



When Customers shop - by day of the week



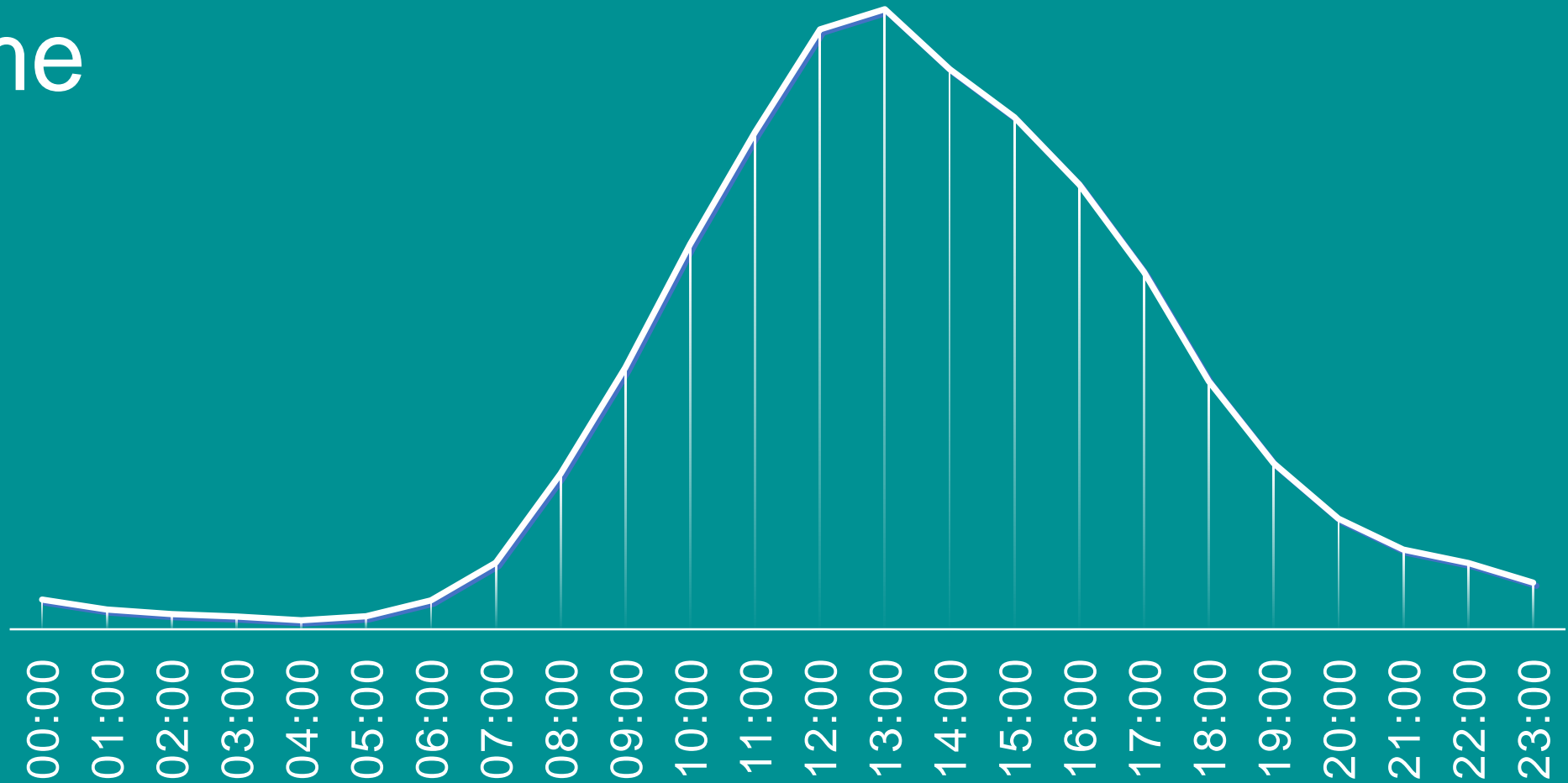
When Customers shop - footfall across the day



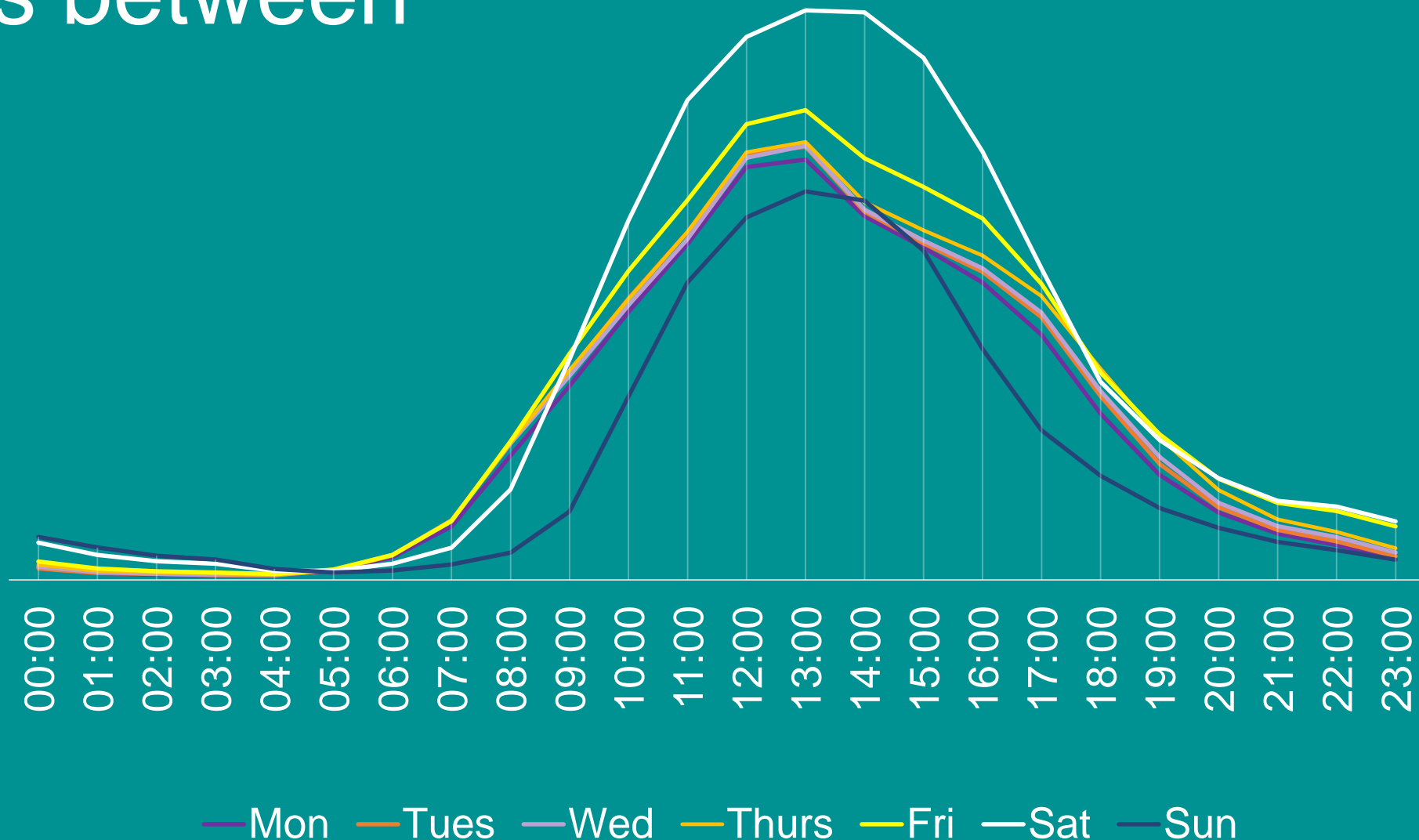
■ Morning: 12am-9am
■ Evening: 5pm-8pm

■ Day: 9am-5pm
■ Night: 8pm-12am

When Customers shop -
footfall peaks at
lunchtime



When Customers shop - differences between days



When Customers shop - footfall across the year

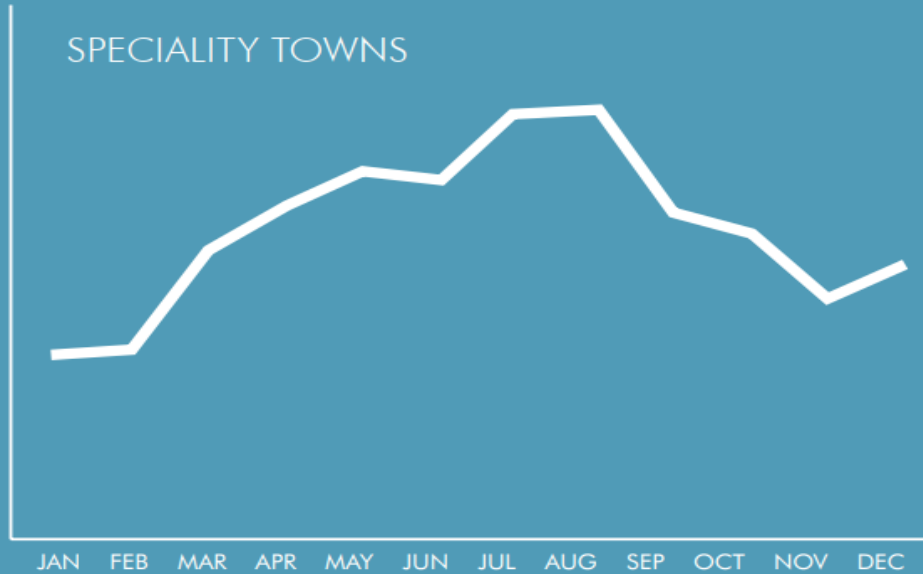


High Street Signature Types

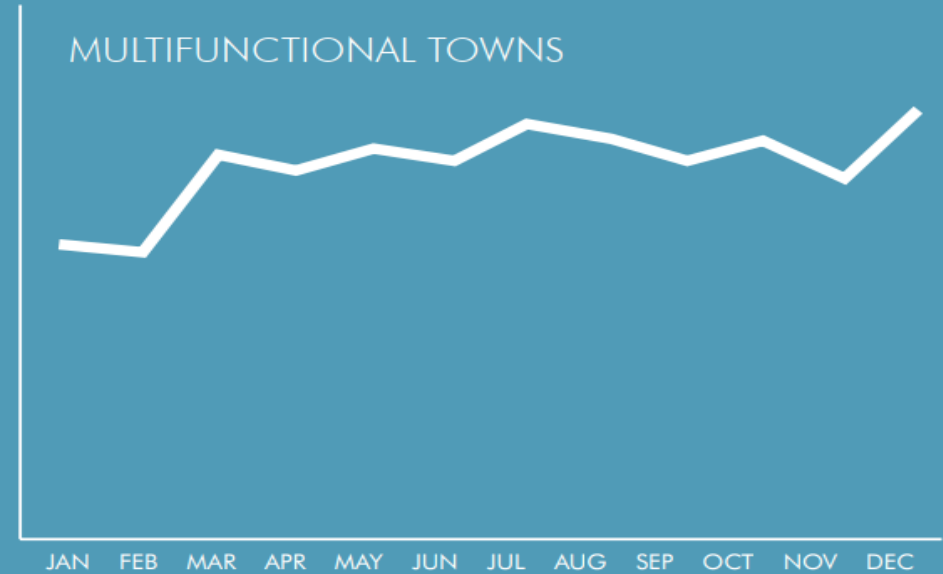
- Ground breaking research 2018



Town Signature Types



- Offer something unique and special
- Anchor not retail (e.g. heritage)
- Attract visitors but serve local population
- Have longer dwell time
- Management and marketing focused on protecting and promoting identity and positioning



Small Multi-functional

- Anchor is ordinary/everyday - work, public transport, groceries
- Frequently visited by local, mainly resident, catchment
- Management and marketing focused on improving access, reliability, connectivity and widening diversity of linked trips

Large multi-functional

- Offer large scale convenient mix of retail, services, events, and employment
- Anchors are major employers, universities as well as retail
- Management and marketing focused on improving access, inward investment, service enhancement, linked trips

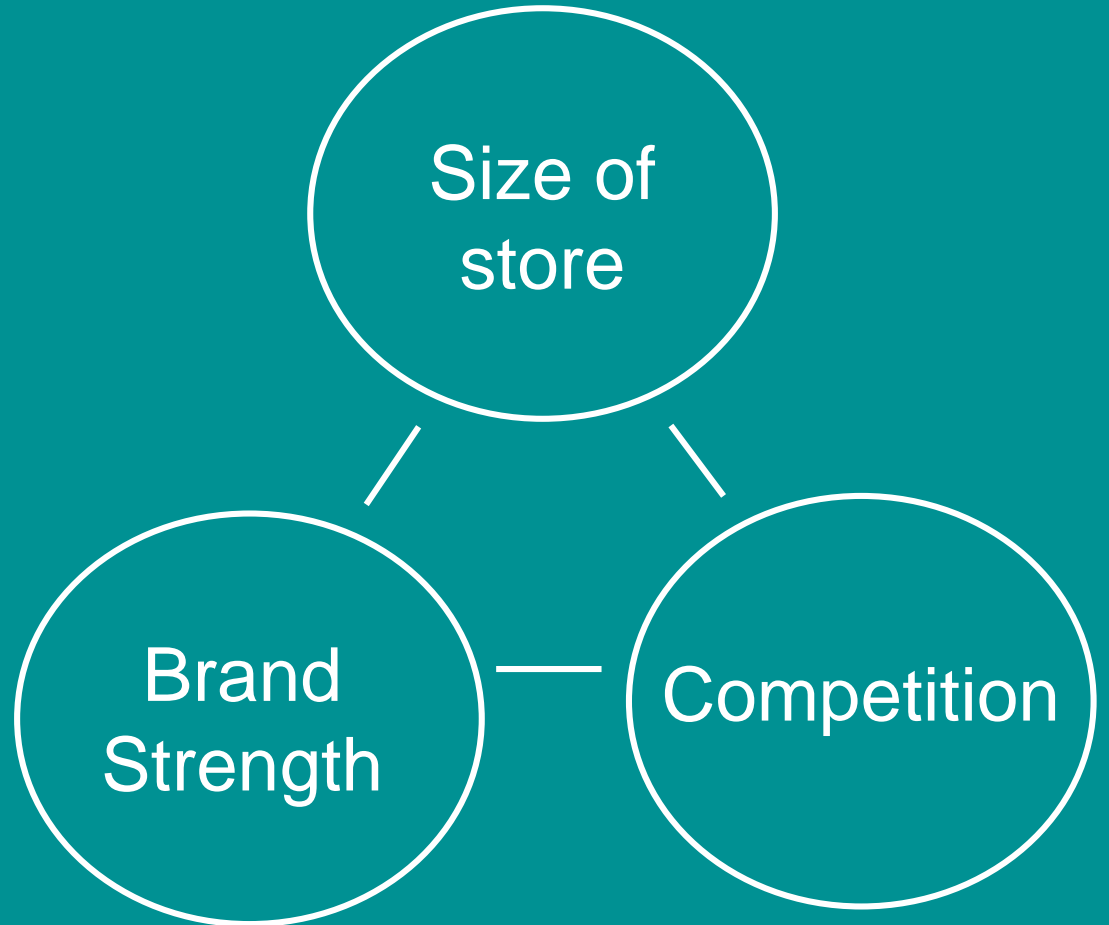
The success of stores
in attracting customers

The Capture Rate



What is the Capture Rate?

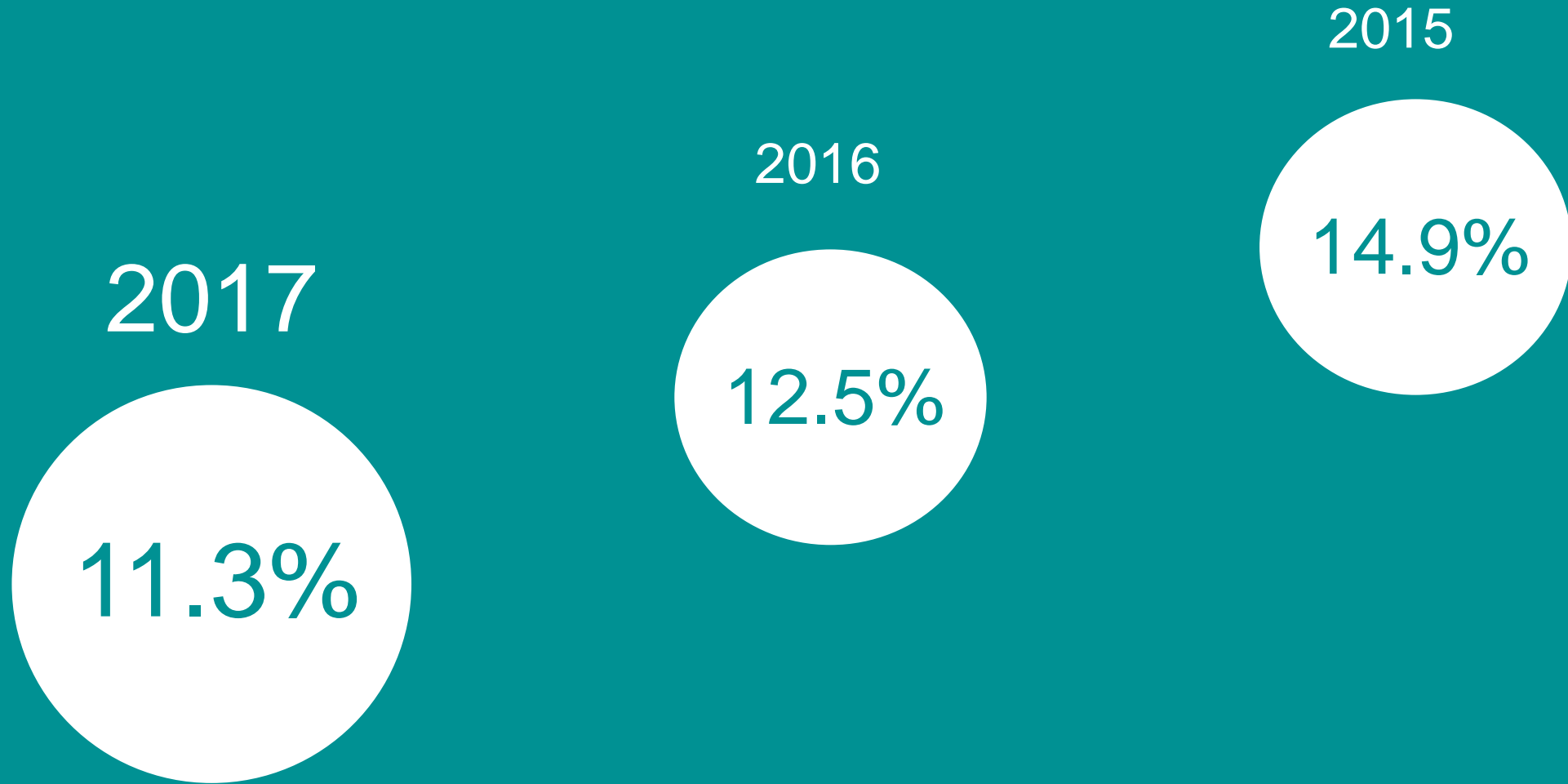
- % of footfall from street/mall entering a store
- Market share of a store in its location



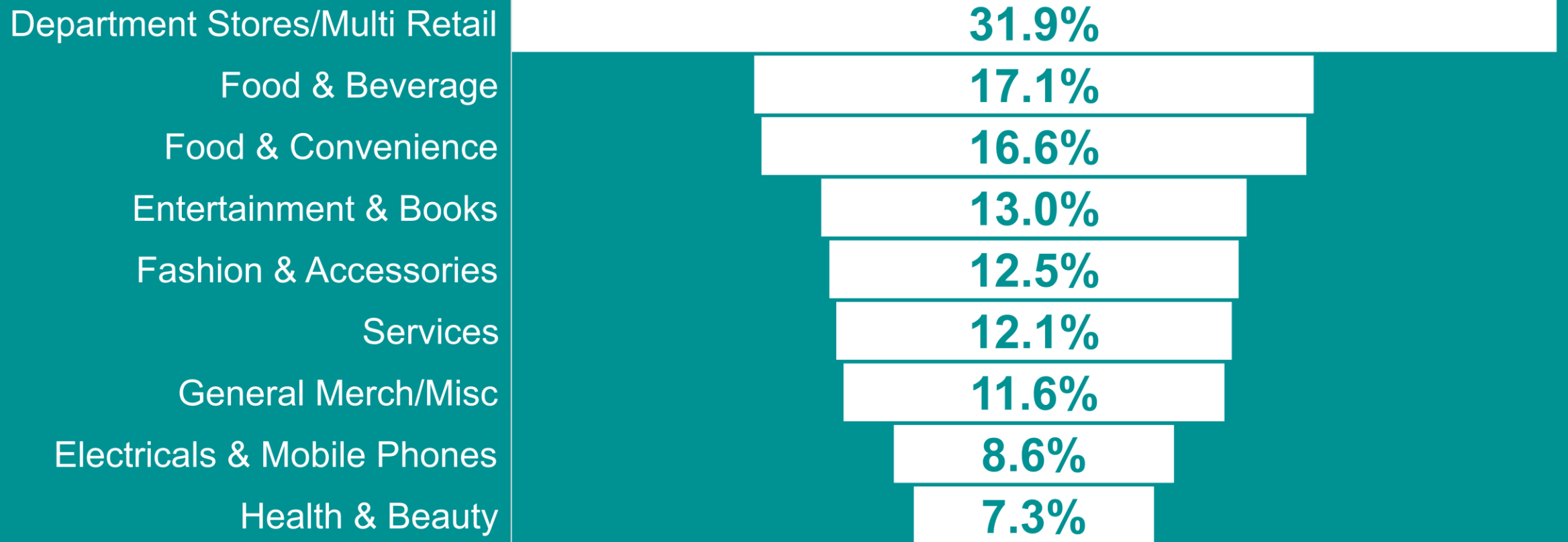
Why is the Capture Rate important?

- Measure of how a store is performing relative to its location
 - Increasing CR – outperforms the location
 - Decreasing CR – underperforms the location
- Knowing your CR helps you to plan and evaluate

Capture Rates – UK



Capture Rates – by Retailer Category



Using the Capture Rate to evaluate store performance

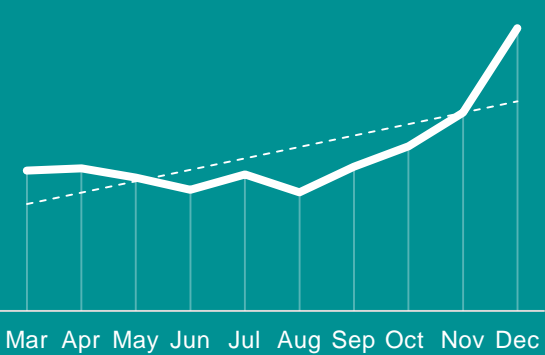
Store
underperforming
its location

Store
outperforming
its location

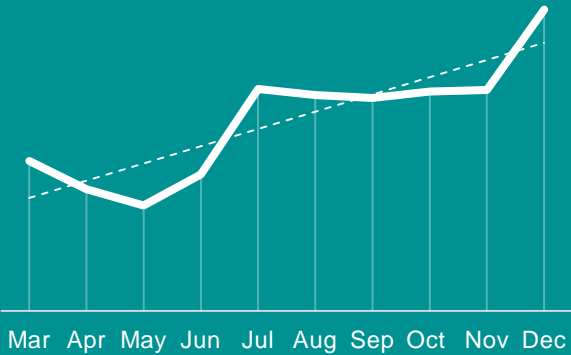
Using the Capture Rate to evaluate store performance

Store underperforming its location

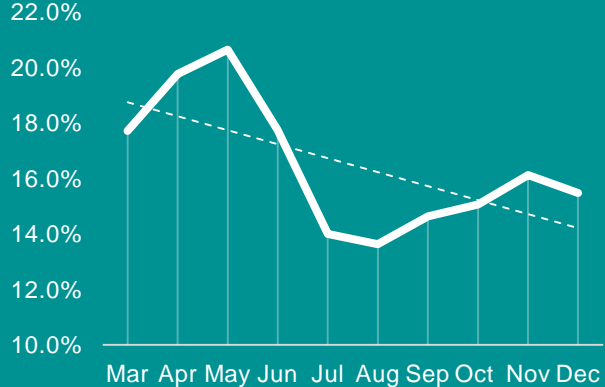
Store 1 Store Footfall



Store 1 Street Footfall



Store 1 Capture Rate

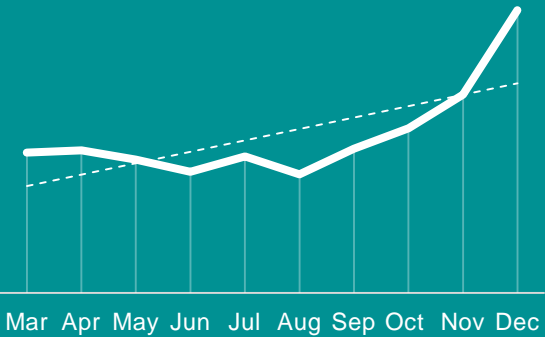


Store outperforming its location

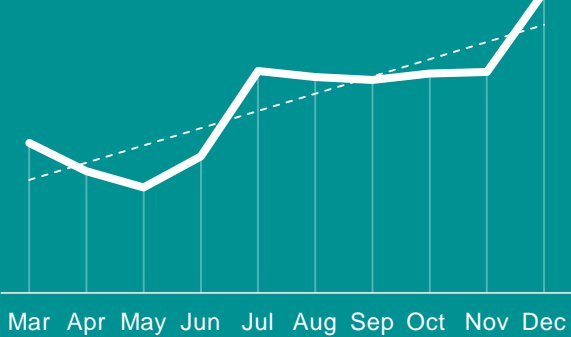
Using the Capture Rate to evaluate store performance

Store underperforming its location

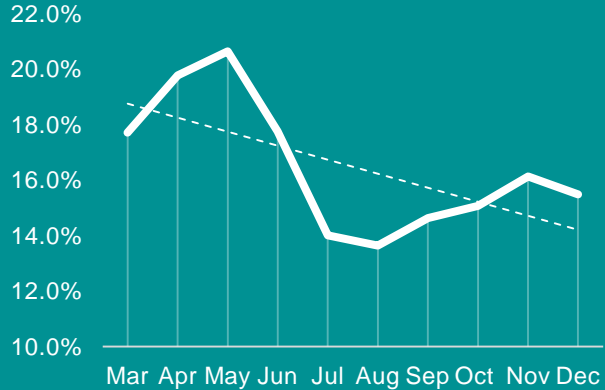
Store 1 Store Footfall



Store 1 Street Footfall

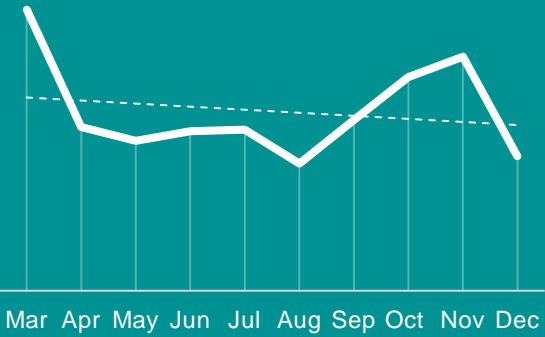


Store 1 Capture Rate

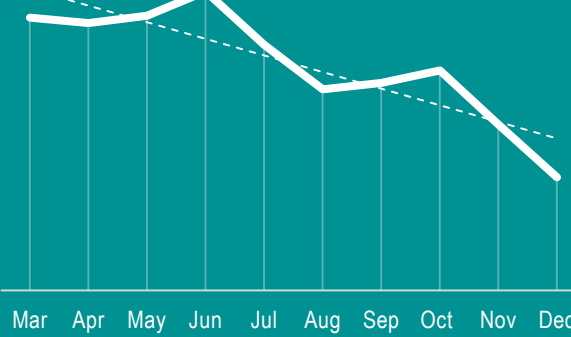


Store outperforming its location

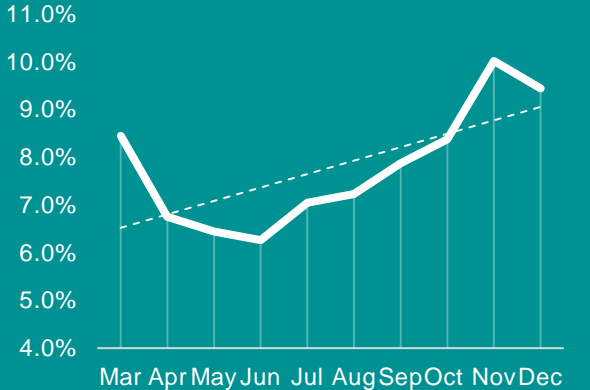
Store 2 Store Footfall



Store 2 Street Footfall

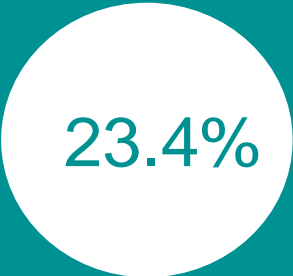


Store 2 Capture Rate



Using the Capture Rate to evaluate store performance

Weekly Capture Rate



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
08:00	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
09:00	16.3%	5.8%	7.0%	22.4%	6.1%	14.0%	0.0%
10:00	51.1%	39.0%	41.4%	50.2%	45.0%	47.1%	11.4%
11:00	38.5%	32.4%	25.5%	45.7%	35.5%	26.4%	21.3%
12:00	23.3%	24.7%	15.4%	33.2%	29.8%	23.2%	23.9%
13:00	25.1%	20.0%	20.8%	25.6%	35.7%	27.0%	24.0%
14:00	43.2%	28.2%	24.7%	35.6%	41.7%	23.6%	22.1%
15:00	36.7%	28.2%	32.0%	27.4%	41.4%	26.7%	20.3%
16:00	32.9%	34.9%	23.6%	35.1%	35.9%	19.2%	16.8%
17:00	30.3%	33.2%	26.1%	34.3%	27.8%	17.3%	23.0%
18:00	18.0%	19.4%	17.6%	23.4%	37.5%	19.2%	23.6%
19:00	10.3%	11.7%	11.6%	13.1%	17.6%	14.2%	5.9%
20:00	9.6%	4.0%	7.0%	2.8%	13.2%	7.1%	0.2%
21:00	5.2%	3.4%	3.1%	0.0%	15.3%	11.3%	0.0%
22:00	0.0%	1.1%	0.0%	0.0%	4.5%	6.7%	0.0%
23:00	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%
Total	26.7%	22.4%	19.8%	28.0%	29.2%	19.6%	18.2%

Using the Capture Rate to evaluate marketing and promotions

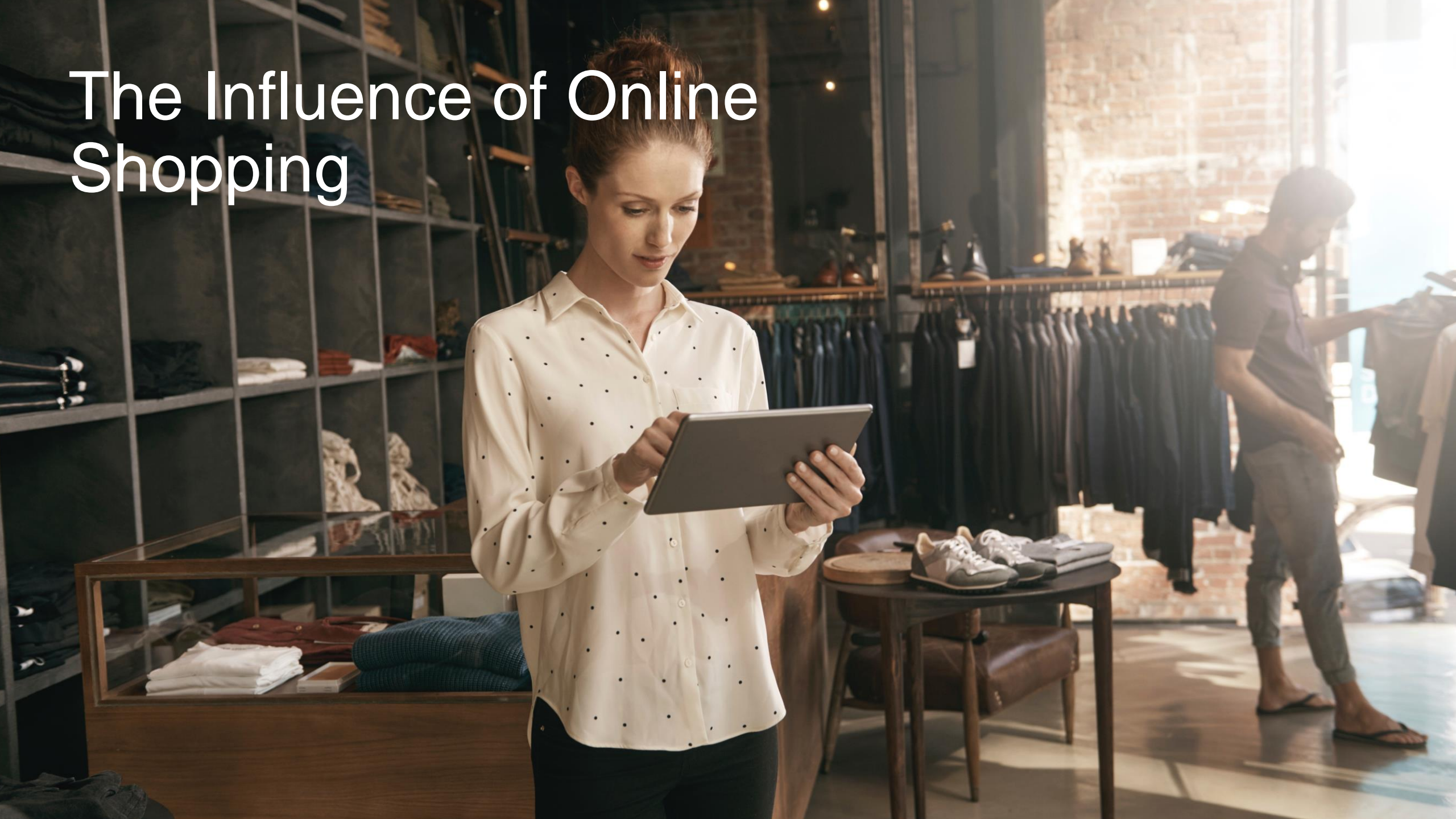
- ❑ Store footfall 5,000 customers pw
- ❑ Footfall in the street 100,000 pw
- ❑ Store's Capture Rate 5%

Promotion works	5,200	100,000	5.2%
Promotion retains	5,200	105,000	5.0%

Footfall Trends

A street scene in London featuring a row of red telephone booths on the right and brick buildings on the left. The text 'Footfall Trends' is overlaid in the center. The scene is captured in bright daylight, with shadows cast across the cobblestone pavement. In the background, a few pedestrians are walking down the street, and a tree provides shade. The overall atmosphere is that of a classic, historic urban environment.

The Influence of Online Shopping





8a
m



Read news, check emails, meetings, bank balance, weather, train times

2p
m



Meet for business, check emails, shop online, network with friends, pay bills, send texts, tweets

6p
m



Check travel report, record TV, FaceTime family, read books, check in for flights, get recipes for

9p
m



Catch up on missed TV, check emails, network with friends, check tomorrows schedule, set alarm



Estate Agents



Travel Agents

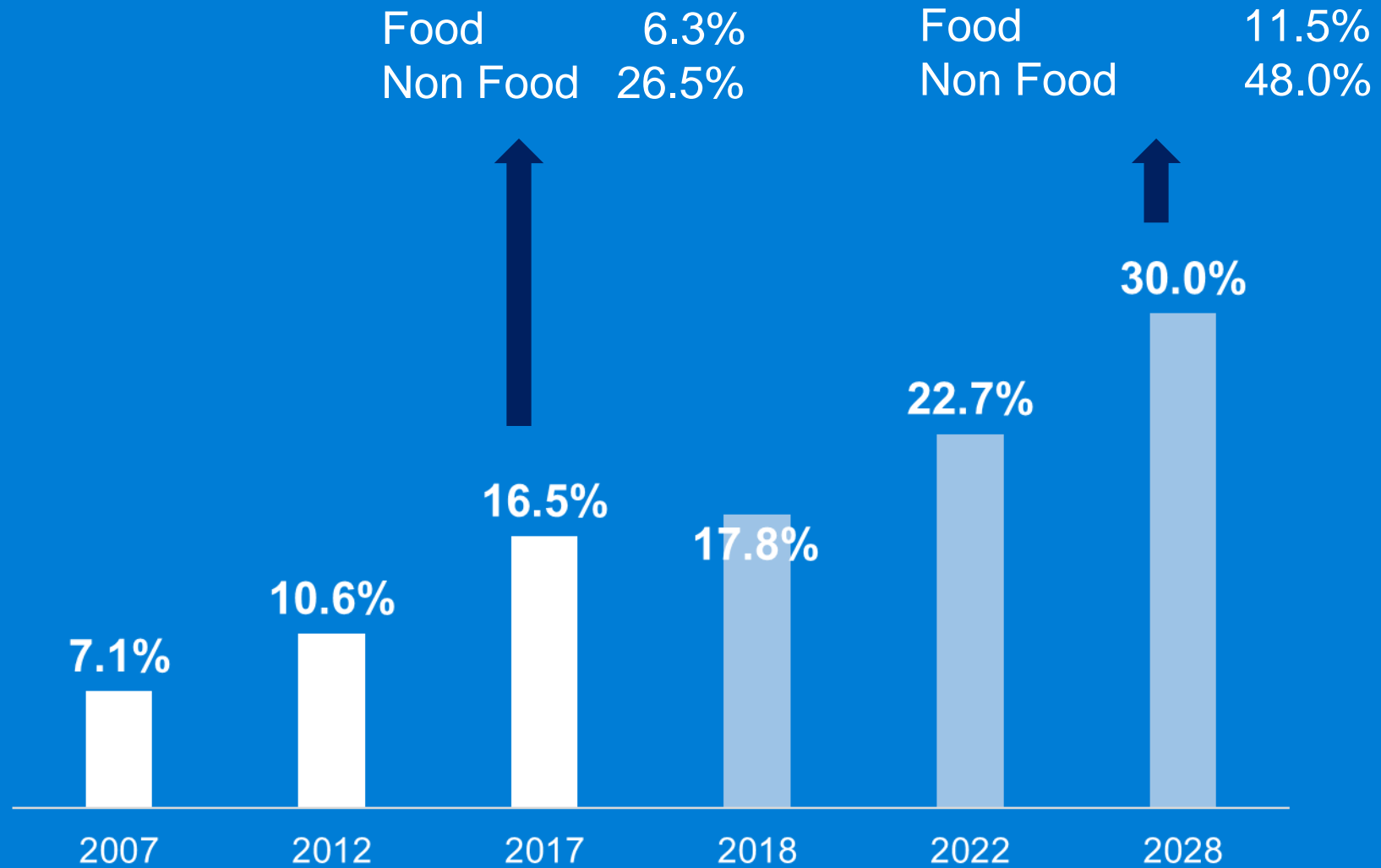


Post Office & deliveries



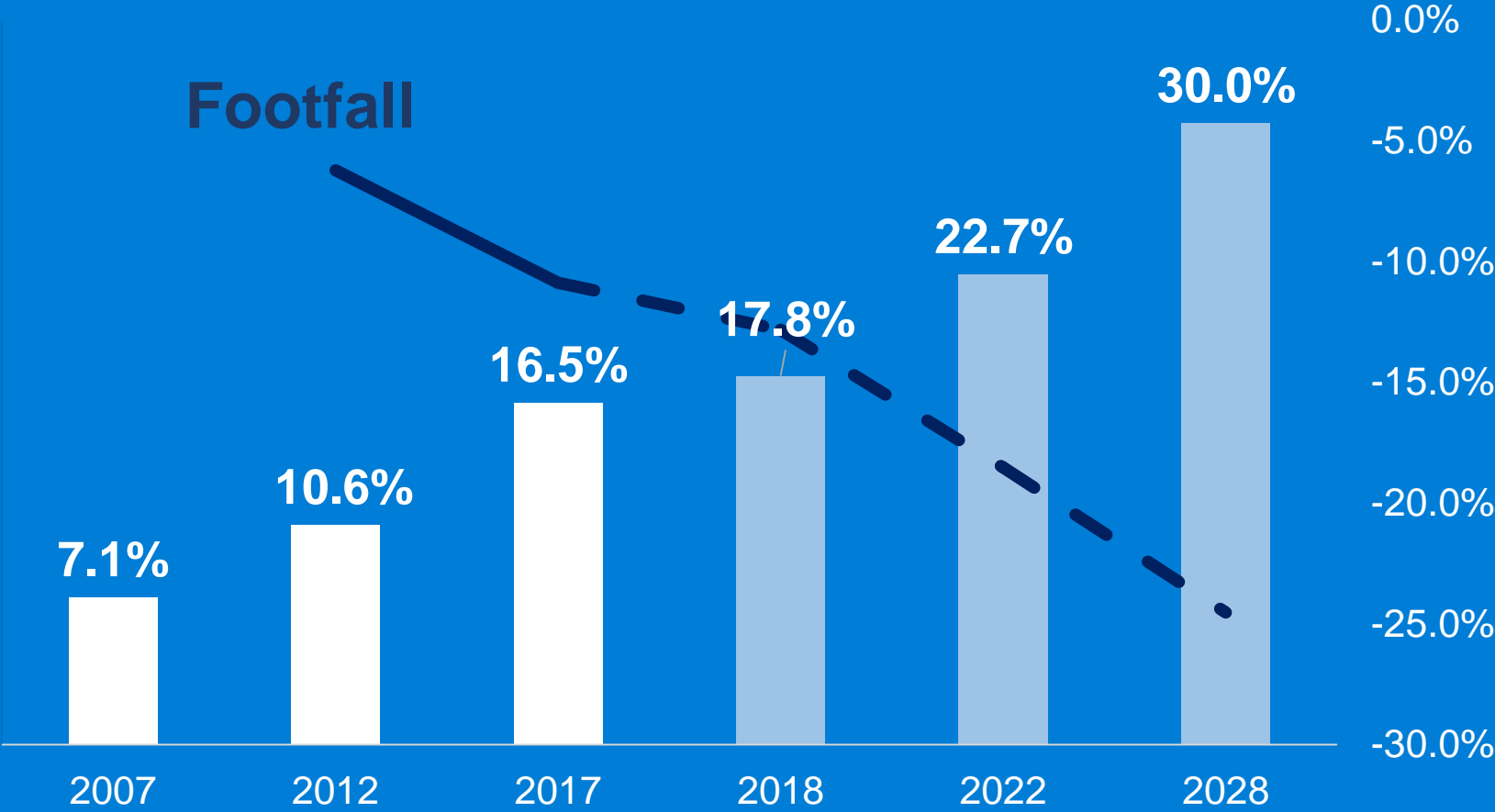
Banking

The growth in online spending



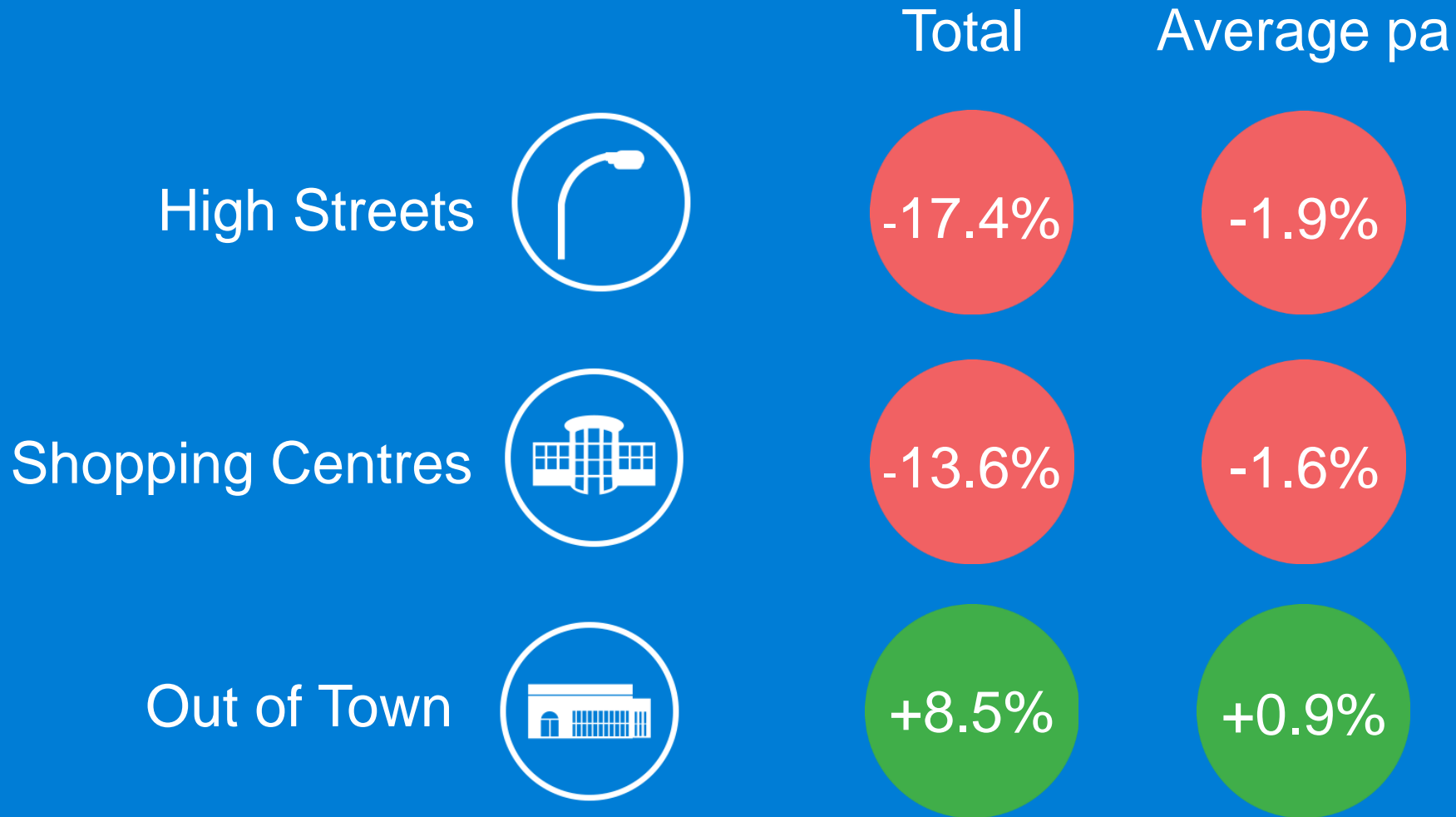
Source: CRR

Impact on Footfall

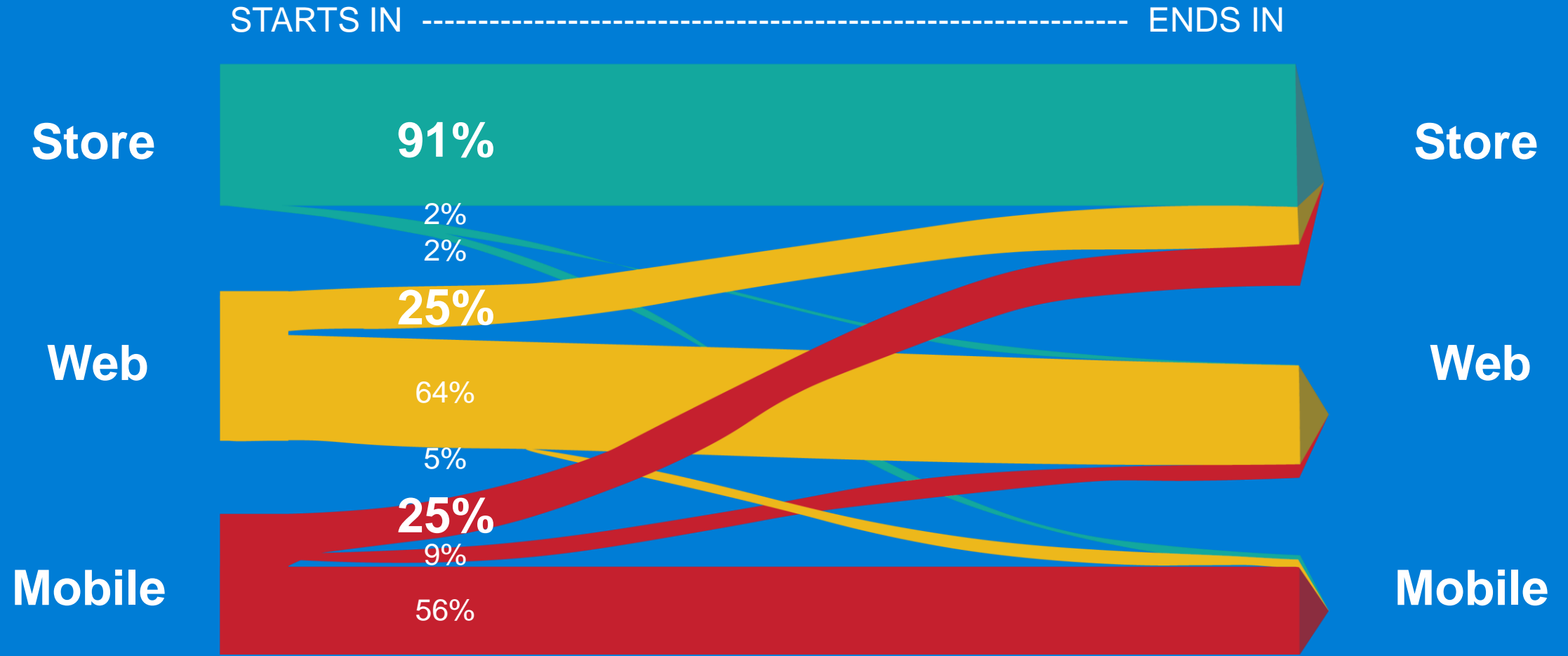


Source: CRR

Impact on Footfall (2008 to 2017)

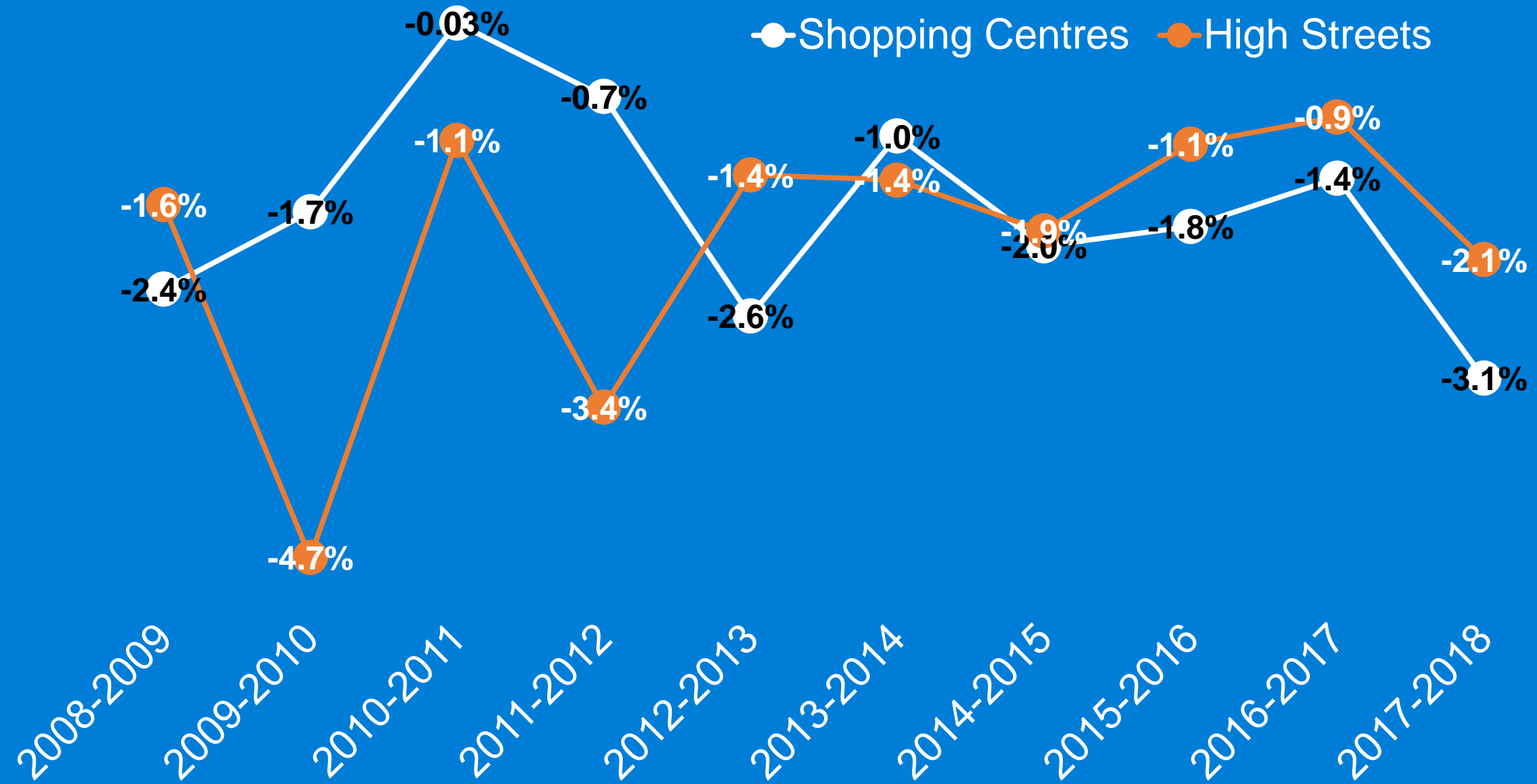


The customer journey



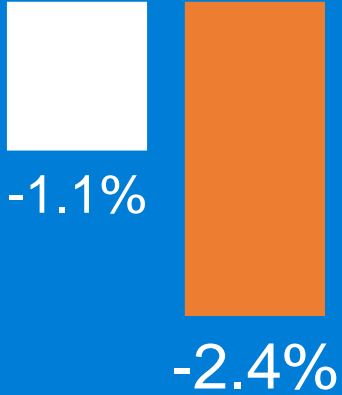
Source: Foresee

The high street is not dead

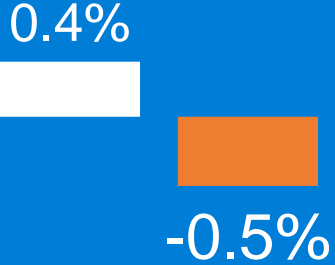


Increasing influence of experience

Day time
(09:00 – 16:59)



Evening
(17:00 – 20:59)



Night time
(21:00 – 08:59)



■ Average 2014-2017 ■ 2017-2018

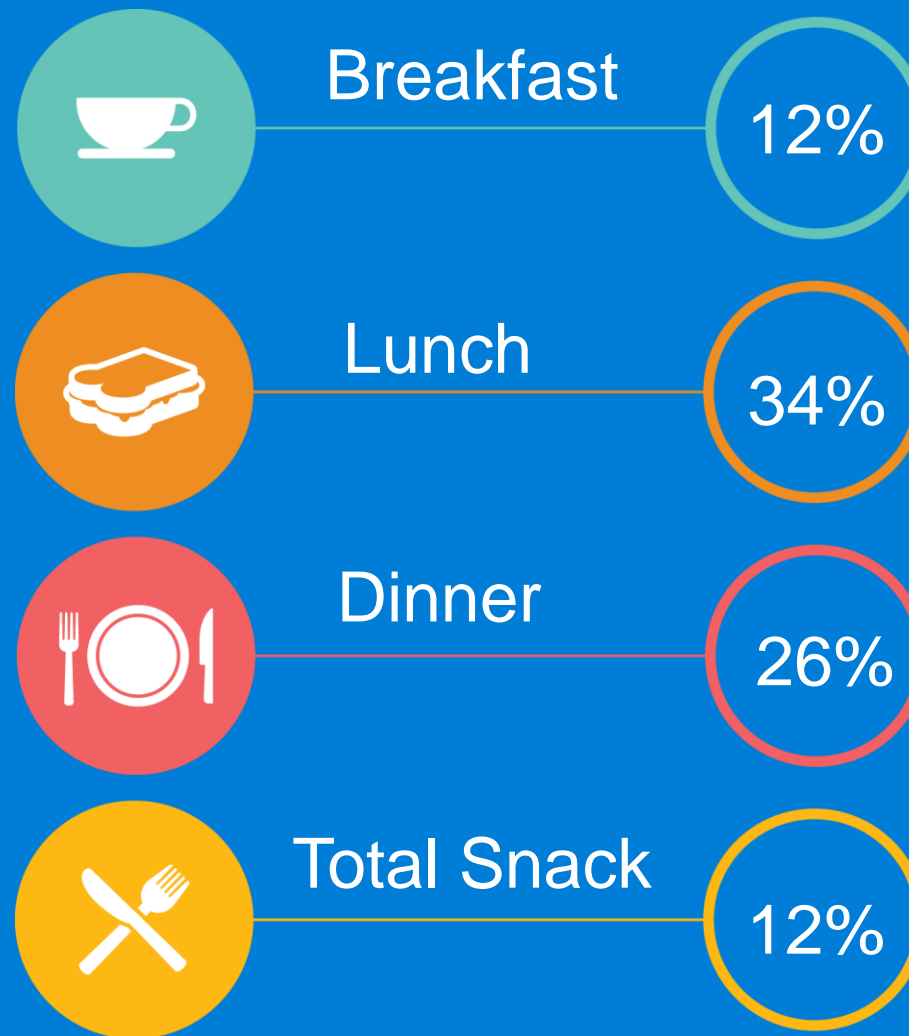
The Eating Out Market

Increase in Consumer Spending July 08 to July 17

Quick Service Restaurants	+25%
Casual Dining Chains	+59%
Coffee Shops	+39%
All retail	+8.1%
Non-store retail	+113.5%

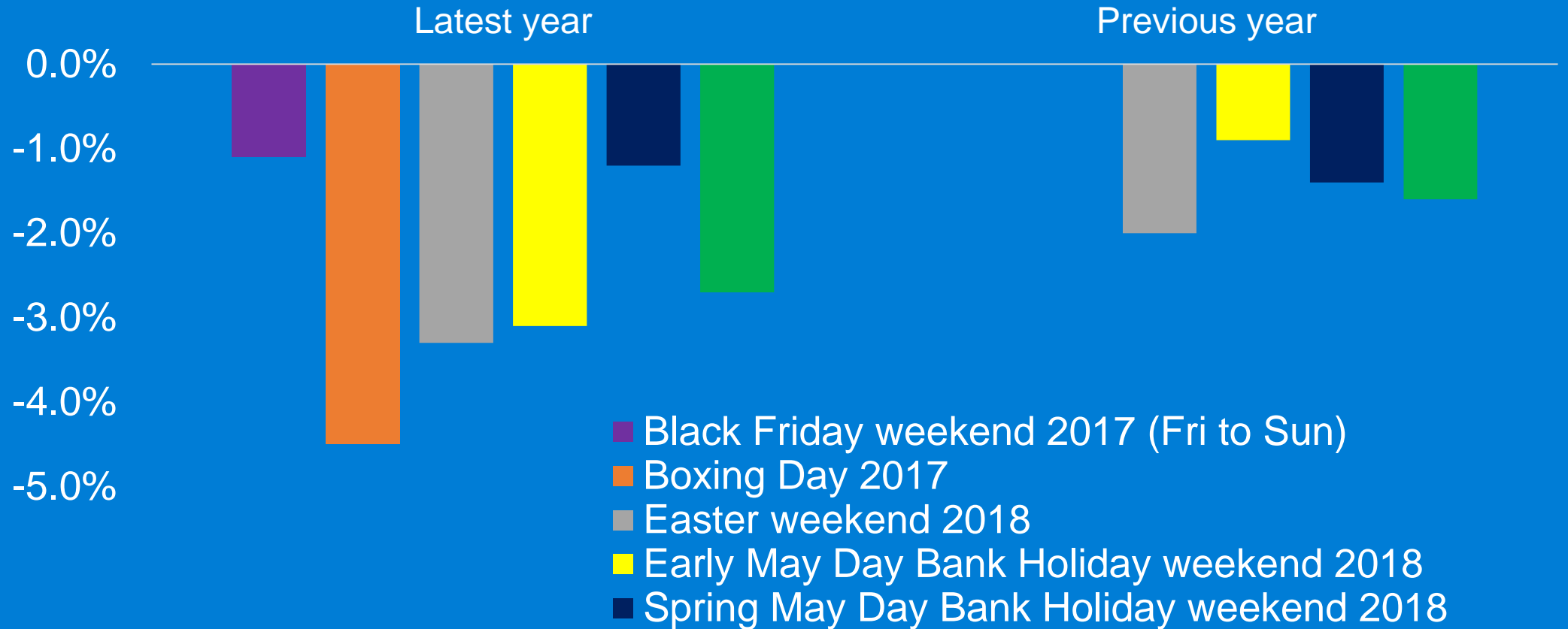
Source: NPD Crest

% of spend



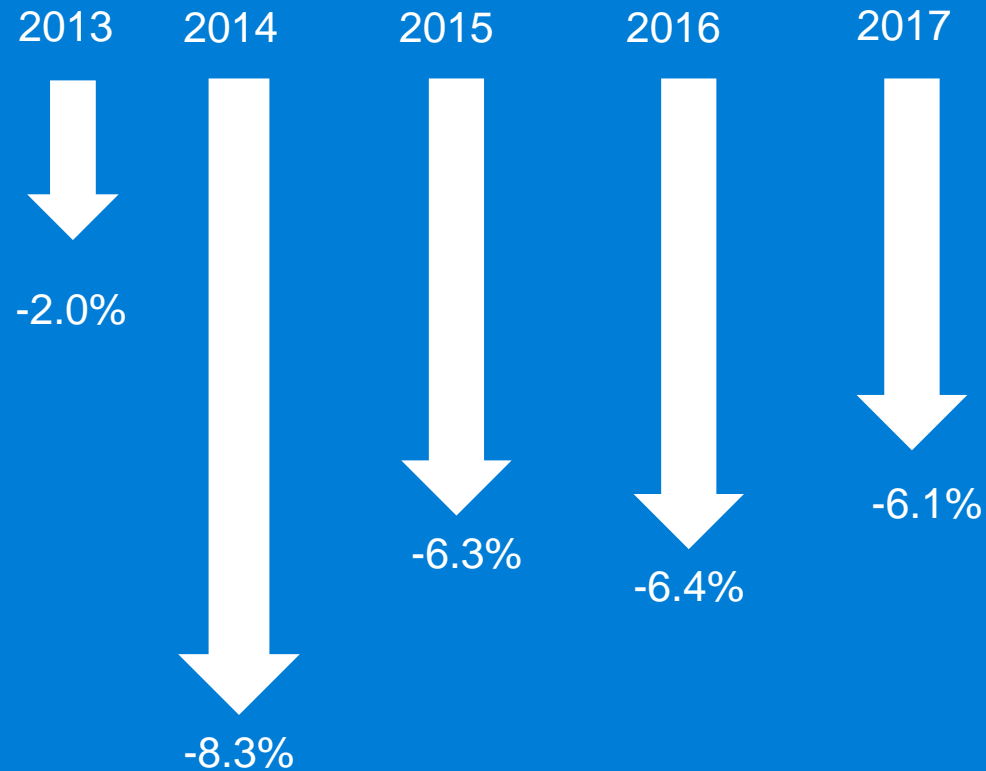
Key Trading Days

% change in footfall from the previous year



Christmas Trading Period pattern of footfall

Boxing Day Footfall vs Black Friday





**Outcomes for customers
And therefore for retail**

Outcomes for customers

- Greater choice
- More knowledgeable
- Higher expectations
- More demanding
- Experience matters
- Point of difference makes more of a difference

Outcomes for customers and therefore for retailers

- Greater choice
 - More knowledgeable
 - Higher expectations
 - More demanding
 - Experience matters
 - Point of difference makes more of a difference
- Exploit customers
 - Create an experience
 - Maximise flexibility

QUESTIONS

Diane Wehrle

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