

Chichester City Centre

Annual Review 2017





Chichester district's population was estimated at 116,976 in Summer 2015 (most recent figures), and represents an average increase of 750 each year.

Chichester has an ageing population, with 27% of its residents 65 or over. There is a small peak between ages 14-24, but a noticeable drop between 25 and 40.

A slightly higher proportion of those under 30 are male. Beyond 33 years old, females make up the majority of the population in the district.

'Professional' occupations are the highest occupation group in the district (19%; 2011 census), with the proportion of managers, directors and senior officials higher than regional and national averages.

The Chichester Business Improvement District (BID) operates with fixed five year terms. Launched in 2012, the BID entered its second term in April 2017.

The operating area of the Business Improvement District (and the focus of this report) is outlined in orange on the above map.

The area broadly includes all businesses within the city walls, including Metro House, The Hornet, St Pancras and Southgate.

With another year passed, it is time to review the changes in 2017 in & around Chichester.

The figures for 2017 show an optimistic rise in footfall through much of the year, leaving Chichester growing where the national average continues to fall. However, early signs in 2018 suggest this may have been short-lived, and the weather has done little to help.

Christmas is a particularly interesting case. Commentators first suspected Black Friday of bringing festive shopping forward into November, but Chichester is seeing a rise even before then, followed by a sharp drop and – in 2017 – an even greater return.

In any case, Black Friday itself means little on the high street but perhaps rather more online. Are we seeing some kind of symbiotic relationship between the two?

Vacancies have risen in 2017. At first this seems a cause for concern but, as I was reminded recently, a proportion of vacant space is needed to sustain a healthy turnover. Chichester BID is now reviewing vacant properties quarterly and it seems that the vacancy rate is settling, despite a number of moves on the High Street.

As we improve our understanding of the retail property, so too am I looking at more substantial data sources to bring to the city. There is a hive of activity around census data at the moment, and drive time analysis in this report is an early inroad (pardon the pun) into understanding how people get to Chichester, where they come from and – eventually – their demographic background.

These things perhaps did not matter so much many years ago, but with ever increasing pressure on our High Streets, I do believe clear & concise access to data will help us understand the market and attract more people to Chichester.

With that in mind, I am very pleased to present my 2017 report to Chichester.

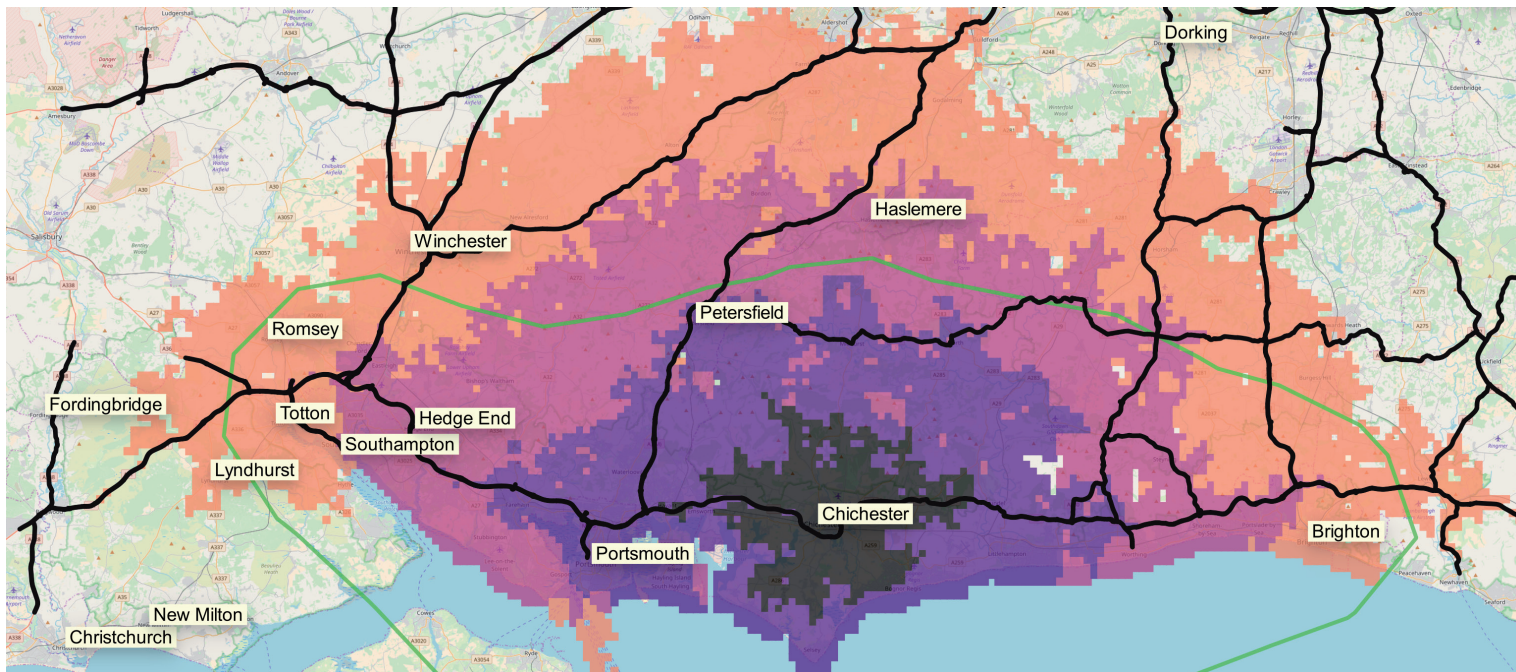


Sven Latham
Noggin Ltd
June 2018

This document is intended to provide an independent evaluation of the performance of the area within the Chichester Business Improvement District.

Chichester BID has commissioned Noggin to collate, analyse and report upon various sets of data available locally.

Local Area



Drive Time

This chart considers the travel time by car from a point in Chichester – in this case, Avenue de Chartres car park - to locations around the South Coast. Each coloured band represents a further 15 minutes' drive.

Notably, the relatively easy access to the M27 & A27 trunk road from this point allows us to cover a considerable distance in either direction, from the edge of the New Forest to the far side of Brighton and Lewes.

Access to the North is less far-reaching, perhaps as fewer direct routes are offered. Once we reach key routes – A3, A23 and A24 for instance – we can get to major towns like Guildford and Crawley within an hour or so.

Drive times are based on “ideal” measures – the maximum posted speed limit for each road. A 20% delay has been added to each journey to accommodate some traffic, but this will not consider areas where actual travel speed is considerably below posted, either through congestion or road layout.

Reach

Twitter analysis gives us an idea of catchment area for Chichester, shown with a green border above.

This area shows ‘home ranges’ for Twitter users who have shown activity within Chichester city centre, and covers the 70th percentile of movements. In other words, 70% of people who come to Chichester also circulate in the area shown.

The area covering The Solent is likely due to the generalisation applied to the data to draw tidier areas. Greater London (not shown here) was also proposed, likely due to the bi-directional nature of the analysis: the method equally shows Chichester residents travelling to or visiting London as it might show Londoners travelling south.

This shows a similar east-west bias as the drive time results, suggesting that the M27-A27 connection is indeed pulling visitors from across the coast, whereas the area does not extend to the North as far as drive times might otherwise suggest.

Above: ‘drive-time’ to Avenue de Chartres Car Park.

Each coloured band represents an additional 15 minutes to the destination.

Twitter ‘home range’ coverage shown with a green border.

Map and routing data © OpenStreetMap contributors.

Twitter data (amended): Lloyd, A. & Cheshire, J. (2016), Deriving retail centre locations and catchments from geo-tagged Twitter data. Computers, Environment and Urban Systems, 61, 108-118. CC-BY 4.0

Retail



Retail Sales

Average year-on-year.
Based on till sales.

Annual Trends

Chichester BID began to collect Year-on-Year retail sales data in April 2017, with up to 14 shops across a variety of sectors and locations participating in the anonymous survey.

Chichester has generally shown mixed to positive results, with a particularly strong performance in the run-up to Christmas 2017.

The collected data suggests that the businesses surveyed showed an average sales increase of 4% compared to 2016, against a national decline of 0.8% in the same period.

However, it must be stated that the sample size is small and performance has varied significantly across the submitted sets of results.

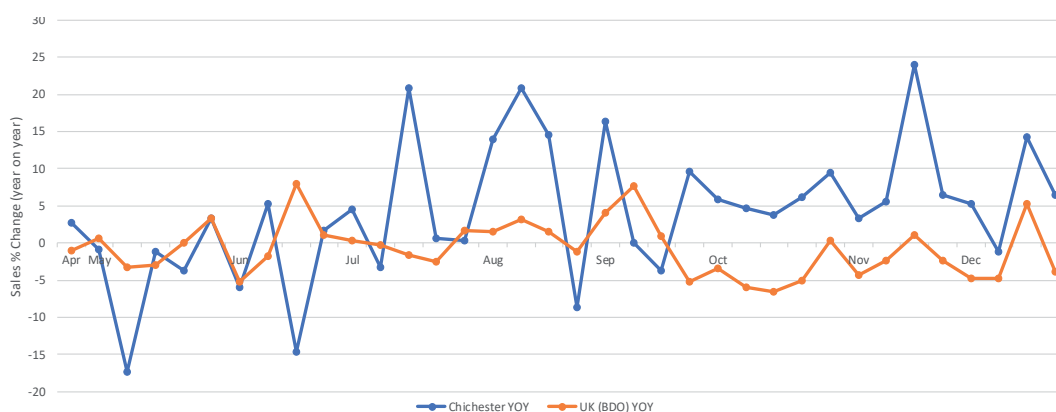
Sales vs Footfall

Sales have aligned with footfall more than in previous years (shown at bottom), perhaps due to a greater spread of retail types in the survey, and larger number of participants.

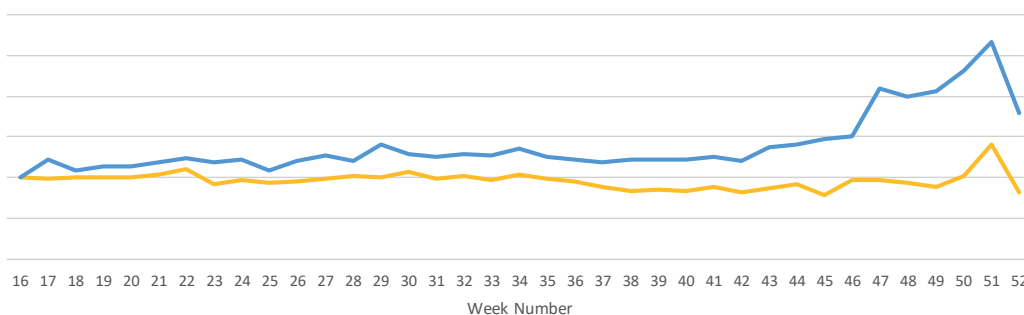
Still, there does appear to be a slight upwards bias which could well be reporting error.

It is interesting to note that sales improve relative to footfall around week 47 (w/c 20 November) - Black Friday, Christmas Lights Switch-on & the first Thursday Late Night events all arrive on this week.

Right: Year-on-year % change in sales. Chichester's sales performance compared to national average



Right: Comparing week-on-week sales with footfall



Visitors

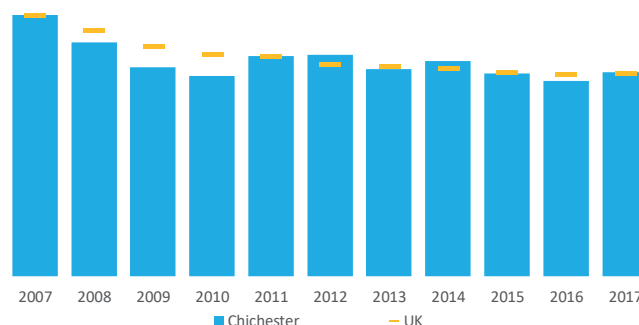


Footfall

2017: 9,593,582

2016: 9,174,948

East Street Footfall.
Based on calendar year.



Chichester has a single footfall camera, installed on East Street near the Cross.

Footfall cameras measure pedestrian movement across a virtual line. This line extends across the width of the street from Oasis to Topman. Each person moving across the line is counted by the system.

The camera has been operating since late 2006, so gives us over a decade of long-term data in the city, particularly around the retail-heavy East Street. We are also able to compare Chichester's data with benchmarks from over 250 towns and cities across the UK.

Footfall in Chichester saw a rise in 2017, with annual figures 5% above the previous year. Most weeks – particularly earlier in the year – showed a positive change compared to the same week in 2016.

This compared favourably to the UK average (down 1.1%). However, it is worth looking at the long-term trends, above right, showing that – despite some volatility in Chichester's footfall, it remains roughly on par with the UK average over the last decade.

Monthly footfall can be used to classify towns according to one of four key types. These figures continue to reaffirm Chichester's likely designation as a 'multi-functional' place, where the city centre is more driven by local trade than seasonal or tourism.

Multi-functional centres remain relatively consistent throughout the year – a good sign for economic stability, as these locations provide both convenience and choice to local residents, who will frequent it at all times of the year.

Above: Chichester annual footfall compared with UK average.

Busiest Days in 2017	Count	Notes
Saturday 23 December	48207	
Friday 22 December	48168	
Thursday 21 December	46230	
Wednesday 20 December	44343	
Saturday 29 April	41650	1
Saturday 20 May	41462	
Saturday 15 April	41106	2
Saturday 11 November	41064	3
Saturday 25 March	40678	4
Saturday 30 September	40539	5

1. First Saturday after Easter break.

2. Falls within the Easter break.

3. Remembrance Day.

4. Day before Mother's Day.

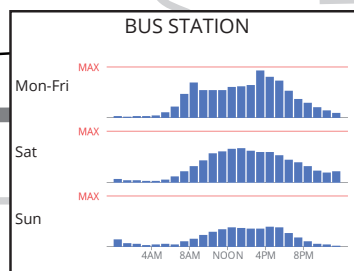
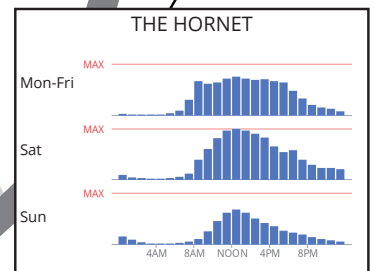
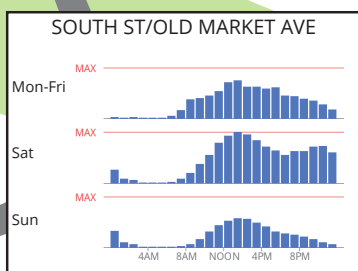
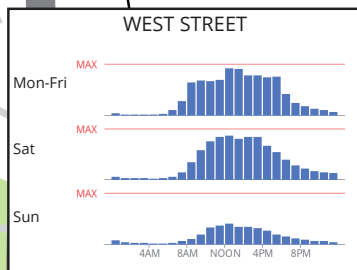
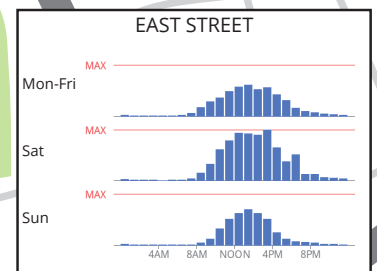
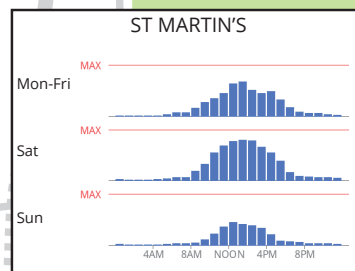
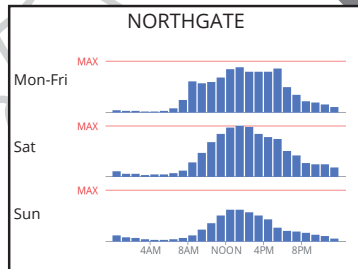
5. No inner city events to explain.

However, University of Chichester ran an Open Day on this date which has previously been linked to increases in footfall. A "Comic Con" event was also held at the College, which may have further boosted local footfall.

This map indicates patterns of footflow across the city in 2017. Charts show traffic on weekdays, Saturdays and Sundays. 'MAX' indicates the maximum footflow at any point in the week for each location.

Weekday/weekend differences are particularly noticeable on retail streets and the bus station.

Night time economy is evident, especially on South Street as footflow continues into Saturday & Sunday mornings.



Events

General Market

Every Wednesday

Since starting in mid-2016, the General Market occupies North and East Streets every Wednesday. The footfall was slow to react at first, but it appears that – in 2017 – Wednesday numbers are 12% higher than the year before.

By comparison, other weekdays are on average 3% higher, and weekends are 5% up in 2017.

Wednesday's growth – nearly 9 points above other weekdays – would suggest that the markets are having some positive influence on East Street footfall.

Farmers' Market

First and third Fridays of the month

There are distinct peaks in footfall on Farmers' Market dates between February and mid-June, with footfall on these Fridays often 15% higher than non-market dates (sometimes as high as 22%).

However, this distinction disappears in the latter part of the year, suggesting Farmers' Markets have somewhat of a seasonal influence.

Goodwood Festival of Speed

Thursday 29 June – Sunday 2 July

This event is showing much lower impact in 2017, with city centre footfall counts barely registering a change – and certainly within the variations we see day-on-day. Although the Sunday showed a week-on-week drop of 14%, this might not be attributable to the event: the following Sunday shows similar numbers.

Goodwood Revival

Friday 8 – Sunday 10 September

This annual Revival at Goodwood is a popular event and draws visitors from across the UK and overseas. Local routes tend to suffer, and the city is usually difficult to access.

September 2017 sees footfall figures fall for several weeks, making any impact of this event more difficult to observe.

Saturday 9th appears to be the best performing day. Despite falling 9% from the previous week (as with most days), this day is still 34% higher than the same day in 2016.

Last year, it was noted that the Saturday was worst performing (and had suffered from dreadful weather), so this seems to be a pleasant rebound for 2017. This may give an indication that weather plays a particularly important role in the relationship between Goodwood events and Chichester.

Glorious Goodwood

Tuesday 1 – Saturday 5 August

As with other Goodwood events, Glorious Goodwood shows a diminishing impact on Chichester's figures this year. Friday gave some positive results: 12% up on previous week – although Farmers' Market may have helped boost this.

The worst day is Wednesday 2nd August, with a 14% weekly drop. However, this appears to be due to the weather as a heavy band of rain moved across Chichester between lunchtime and late evening – directly coinciding with a drop in footfall.

Sloe Fair

Friday 20 October

The Sloe Fair is held annually in Northgate car park on 20th October, which falls on a Friday this year.

At Northgate, visitor numbers are down week-on-week through much of the day, before growing substantially in the afternoon & evening. The net result is a 26% rise week-on-week. This also coincides with improved weather, with skies clearing around 3pm.

Generally, the city did not see a significant rise in visitors on this day.

Christmas Lights Switch-on

Thursday 23 November

Held at the Cross, Chichester's Christmas Lights Switch-on marks the start of festivities in the city.

In 2017, it is estimated that 75,000 people came into Chichester on the day of the Christmas lights, with the busiest period predictably for the switch-on.

This is approximately 19,000 more than the previous Thursday and appears to be a slight growth on the previous year (18,000 additional).

However, not all of this is centred on East Street. Northgate for instance saw an increase of nearly 2,000, with people slower to disperse after the event. At the bottom of South Street some 4,000 additional visitors were estimated to pass, again only dispersing several hours after the event itself.

The three monitored long-stay car parks also shows more activity. Cattle market saw about 500 extra spaces occupied at 6pm; Avenue de Chartres saw approx. 300 extra, and Northgate saw sustained usage throughout the afternoon & evening, at capacity for much of the day. This does not include the various spaces and short-term car parks, for which we do not currently have figures.

Black Friday

Friday 24 November

As with more recent past years, Black Friday has failed to attract visitors to Chichester. Footfall was unchanged on the previous Friday and was 3% down on the same day in 2016.

Given this event only really managed to muster interest in 2015, it appears that consumers in Chichester are unbothered by it.

Late-Night Shopping

Every Thursday, 23 November – 21 December

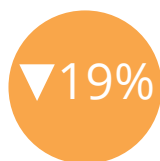
With the first Thursday evening consumed by Christmas Lights Switch-on, we start to get a feel for Late-Night Shopping on the 30th, and the figures are – at first – unremarkable with a 4% year-on-year drop. This is consistent with other days in this particular week.

It is only on 14th December that we start to see any evidence of late night shopping taking hold, with a stronger lunchtime, afternoon and evening trade tailing off at 8pm. Footfall is up 43% week-on-week, although this still fails to compare well to same day, previous year (10% down).

Thursday 21st December brings the strongest results, with a 50% weekly rise again and patterns once again showing a long tail into the early evening, before dropping off at 8pm. This day is also 26% above previous year's figures. The 21st, as part of a final four-day surge – is the third busiest day of 2017.

All Thursdays in the period shows an increase in early evening footfall, with the biggest gains towards the end of December. To put the evening numbers in perspective, footfall around 6pm is typically around 35% of lunchtime numbers in each late-night case. A typical Thursday for the rest of the year would usually see around 20% or lower.

Rail



Chichester Entries & Exits

2016-17: 2,608,084

2015-16: 3,231,354

Figures Apr-Mar. Estimated entries/exits at Chichester.

Chichester Rail Station has seen a substantial decline in passenger numbers in 2017. The official figures noting "industrial action and timetable changes" as likely contributors.

This is consistent with other stations on similar routes: Worthing, Crawley and Littlehampton are all down by similar amounts, whereas Havant, Guildford and Woking – run by a different operator – have largely maintained their figures.

While all ticket types have dropped in number, discounted tickets remain steady at 44% of total sales. Season ticket entries & exits have shrunk by 2 points, whereas full price tickets have grown by the same.

Since the stats are available annually, we can only create a crude estimate of daily impact: approximately 1700 fewer recorded entries and exits than in the previous period.

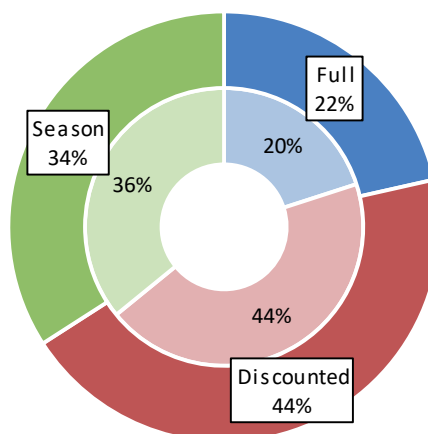
These will include journeys starting at Chichester, as well as those where Chichester is the destination.

When comparing footfall in the city to strike dates, there is no conclusive indication that Chichester has seen a drop with falling rail numbers.

However, given Chichester's identity as a multi-functional place, it seems unlikely that a great proportion of visitors are travelling by train. Specific tourist destinations are more likely to feel a drop than the High Street as a whole.

Station	% Change in Ticket Entries/Exits
Chichester	-19%
Worthing	-18%
Crawley	-17%
Littlehampton	-17%
Havant	-6%
Woking	0%
Guildford	0%

Above: Annual change in entries/exits at each station.
Source: Office of Road & Rail



Left: Ticket types by proportion of entries/exits.
Outer ring = 2016/17
Inner ring = 2015/16

Terms Used

Season is a ticket bought for multiple journeys.

Full is all at-counter full price tickets. These may include reductions with entitlement cards, such as Student.

Discounted is all tickets where a discount has been applied, such as online pre-booked tickets.

Car Parks

Occupancy and Utilisation

As with previous years, and without great surprise, Long Stay car parks in Chichester usually remain consistent throughout the year but tend to drop during school and bank holidays.

Avenue de Chartres' figures suggest a slight dip during the summer months, before rising for November and December. This car park was refurbished during 2017, but figures suggest it continued to be used normally throughout this time.

Online 'real-time' figures for the car parks suggest that Cattle Market and Northgate are often at capacity throughout the week, typically around 11am, and increasingly so in November & December.

By contrast, Avenue de Chartres is rarely reported as full – only nearing capacity in the final weeks and days before Christmas.

Ticket Duration and Counts

Ticket data covers 1 Apr to 30 Sep.

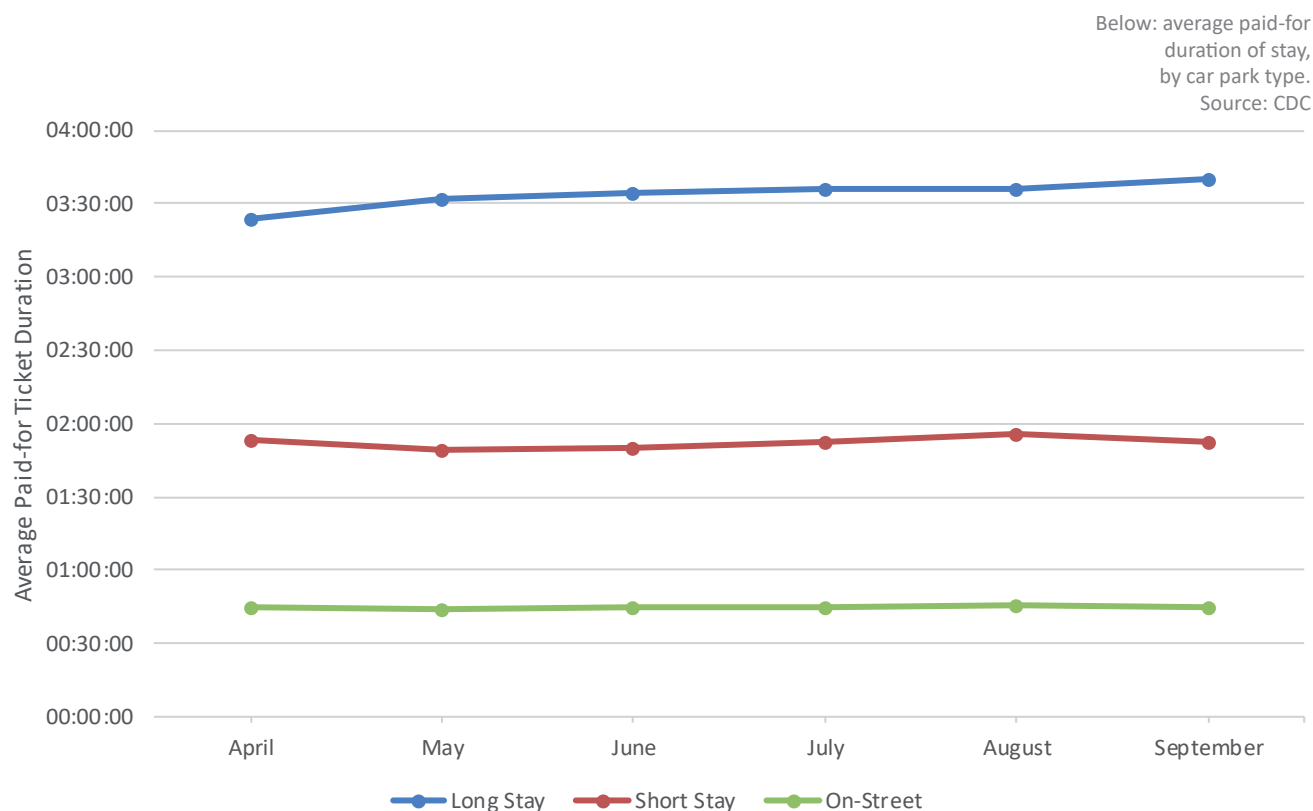
Long stay locations at Basin Rd, Northgate and Cattle Market show an average paid-for ticket of 3hr33, with a slight & steady increase towards September.

Across the short- and medium-term car parks, the average paid-for stay is 1hr52, and remains fairly steady throughout Apr-Sep, with only a slight rise in August.

Orchard Street to the West has the longest average stay (2hr25), perhaps due to its proximity to Council offices.

On-street parking shows unsurprising results: an average paid-for stay of 45 minutes.

The Coach Park on Cathedral Way shows sales peaking in June and August. Payments are divided into sub-2 hour and 2-24 hour periods only, with the longest average stays in July. It appears that Wednesdays are typically the busiest day for coach stays.



Property



Vacant Retail

2017: 8.3%

2016: 4.0%

Q3 survey of Chichester

Chichester has a retail vacancy rate of approximately 8% in 2017 and has remained close to the South East average in this & successive surveys.

The Oct 2017 survey added 18 vacant retail properties to the previous year's count across the city centre.

Many of these were through business vacations, and a notable number of chains left the High Street in 2017, including Thorntons, Argos, Mothercare, Pampurred Pets, Next (Mens' store) and Mr Simms Olde Sweet Shoppe.

At the time of the survey, Oscar the Dog had closed on Cathedral Courtyard with the two new occupants (Coffee Shop & Fudge Shop) yet to take up leases. Several properties in North St & The Horner became vacant, whilst the Boardwalk at Northgate was converted into new units.

Chichester retains a high proportion of independent retailers – approximately 55% - ahead of regional and national figures.



Left: recorded location of each vacant retail property October 2017 (retail defined as Class A only). Map © OpenStreetMap contributors. Data provided by Noggin Ltd

Crime



Reported Crimes

2016: 1045

2015: 826

Home Office annual figures

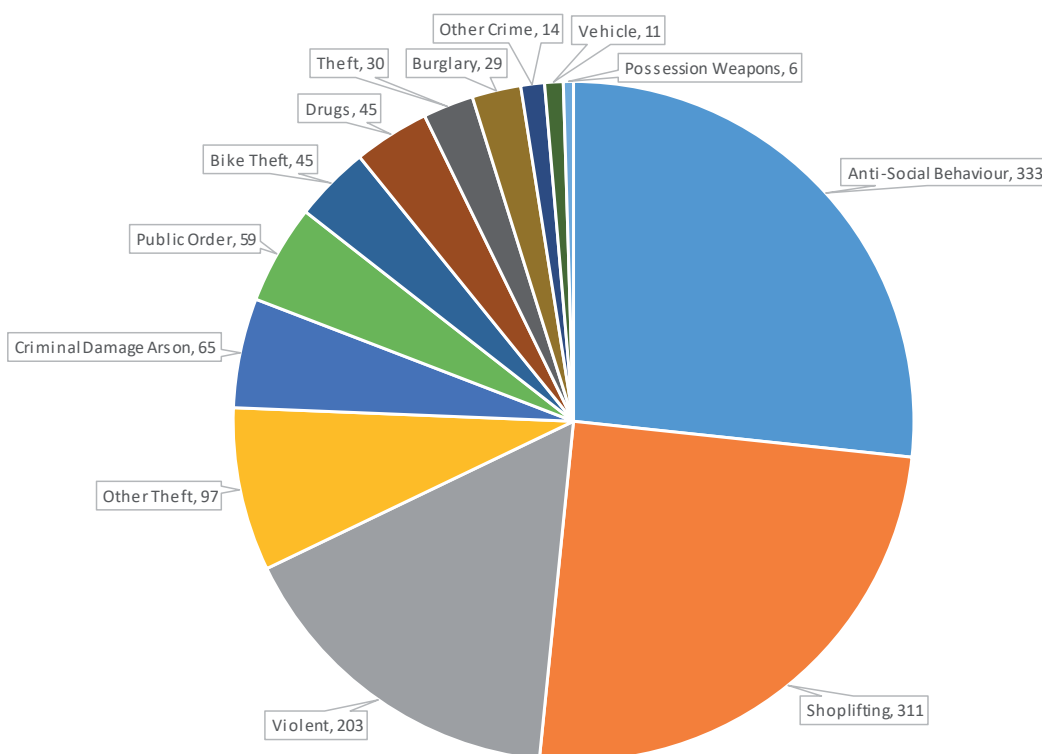
Within the approximate BID area, there was an increase in the number of crimes reported to Sussex Police in 2017.

Of these, just over a quarter were Anti-Social Behaviour related – consistent with 2016.

Shoplifting reports were similar to the previous year (2017: 311, 2016: 308), and represented another quarter of reported crimes.

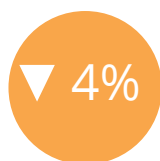
Violent Crime reports have increased (2017: 203, 2016: 126), as have drugs-related reports (2017: 45, 2016: 19).

It should be noted that ChiBAC operates a preventative crime reduction service, which can affect year-on-year statistics as many offenses may be dealt with through alternative means.



Left: breakdown of reported crimes by type, 2017.
Source: data.police.uk

Christmas



Footfall
2017: 837,952
2016: 875,943

Weeks 48-51. Figures from East Street footfall camera.

Despite good footfall figures for much of the year, the four weeks leading to Christmas saw a year-on-year drop in visitor numbers.

This is consistent with national benchmarks: much of the UK saw a fall in the same period, with market towns & cities seeing the worst results.

Chichester's 4.3% drop compares to the national average fall of 4.4%, and continues a long-term trend of falling Christmas figures on High Streets across the UK.

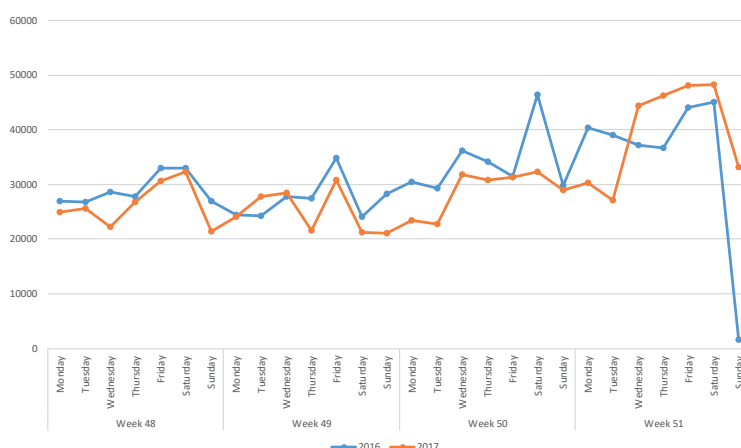
Both local and national figures show evidence that Christmas is coming earlier, and footfall & sales are beginning to rise before December even starts.

Commentators suggest that promotional events such as Black Friday and Cyber Monday are likely contributors to this effect. With more encouragement to shop in November, December's figures become rather more muted.

Chichester experienced this even earlier, with a consistently strong performance throughout the first part of November. Perhaps Chichester's shoppers are taking their own initiatives to start even sooner.

However, despite a decline generally, Christmas 2017 notably picked up in the final week. Wednesday 20th to Saturday 23rd were – in growing order – the four busiest days of the whole year.

Most Christmas periods in previous years could be described as 'a steady climb towards the big day.' 2017 would be 'a flatter, longer season with a final four-day rush.'



Busiest Hours in December 2017	Count
Saturday 23rd 11am-noon	7215
Friday 22nd noon-1pm	6894
Wednesday 20th 1pm-2pm	6884
Wednesday 20th noon-1pm	6816
Saturday 23rd noon-1pm	6813
Friday 22nd 2pm-3pm	6615
Saturday 16th 2pm-3pm	6530
Thursday 21st noon-1pm	6389

Busiest Days in December 2017	Count
Saturday 23rd	48207
Friday 22nd	48168
Thursday 21st	46230
Wednesday 20th	44343
Sunday 24th	33143
Saturday 16th	32362
Saturday 2nd	32246
Wednesday 13th	31817

Sources

With thanks to our data suppliers, providers and other sources: West Sussex County Council, ChiBAC, Chichester District Council, Springboard, BRC, BDO, MET Office, DarkSky, Fludes Commercial, Stagecoach South, the Home Office, Consumer Data Research Centre, University College London, Office of National Statistics and Highways England. Public sector sources obtained and published under Open Government Licence unless otherwise specified. Maps and routing data derived from OpenStreetMap, © OpenStreetMap.org and its contributors. Photos by Sven Latham unless otherwise specified.

With thanks as well to Chichester BID and local businesses who contributed data.

Methodology

We create a computer model of Chichester, based on past performance and research. This allows us to simulate, analyse and forecast various aspects of the city.

Modelling the city provides us with a way to measure how various factors affect the city's performance, and better understand what could be done to improve the city's general outcome.

Measurements can vary significantly day-by-day with seemingly no obvious explanation. We use multiple factors to determine cause & effect for these figures. Our comparisons use the most appropriate method for every circumstance, which may lead to conclusions which differ from others' results.

Percentages are provided rounded to nearest whole number, unless otherwise noted.

Figures are believed to be true at time of going to print and provided in good faith. Estimates are based on information available at the time & may be retrospectively adjusted if new evidence emerges. E&OE.

About Noggin

Noggin evaluates the performance of town centres; how events, campaigns and changes are shaping the local area.

Noggin provides performance reports, expert advice and community portals for its customers, providing a rich set of resources for decision-making and management.

