THE FUTURE OF CITIES AND MALLS

LDP

A different View

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In July 2021 Leisure Development Partnership and A Different View, working in partnership with Panelbase.com, conducted a market research survey of 1,100 UK based shoppers to investigate their likely future relationship with city centres, large towns and shopping centres/malls and what can be done to reverse trends of decline.

The survey was developed by LDP and ADV and the sample had all been shoppers in city centres, large towns and shopping centre/ malls before Covid lockdowns began in 2020.

The sample was recruited from the Panelbase.com database.

Our 1,100 sample of were people who visited a large town, city centre or out of town shopping centre/malls to do non-grocery shopping (clothes, homewares, entertainment etc) before the first COVID-19 lockdown in March 2020.

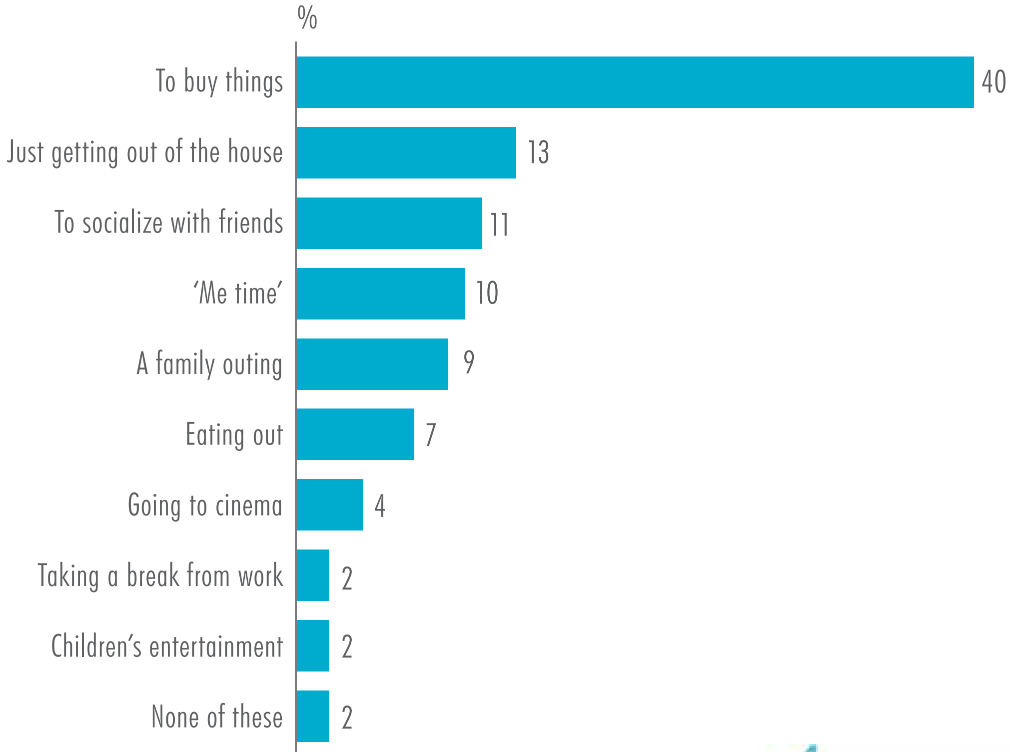
SAMPLE PRE-COVID VISIT FREQUENCY

40% visited daily or weekly
17% fortnightly
22% monthly
21% every couple of months

THE MAIN MOTIVATION FOR VISITING –PRE-COVID

Shopping was the main motivation for visiting large town, city centre or out of town shopping centre/malls but for a majority the main motivation was another activity.

Typically, when you went non-grocery shopping in a large town, city centre or out of town shopping centre/mall before Covid lockdowns, what was your main motivation?



DEMOGRAPHIC VARIANCES
–MAIN MOTIVATION FOR VISITING

The only significant gender variations were that female respondents were more likely to say their main motivation for visiting was to 'socialize with friends' 13% vs 8% and 'me time' 12% vs 7%. Males were more likely to say ' just getting out of the house' 15% vs 11%.

The older the respondents, the more likely their visits were motivated by shopping 26% of 18 to 25 vs 49% of 55+. Socializing with friends was more likely to be a motivation for the young and 'just getting out the house' was consistent across all age ranges.

Those visiting daily were least likely to say that they went 'to buy things' and more likely to say for 'me time' 18% or 'to get out of the house' 18%, followed by socializing 16% and eating out 14%.

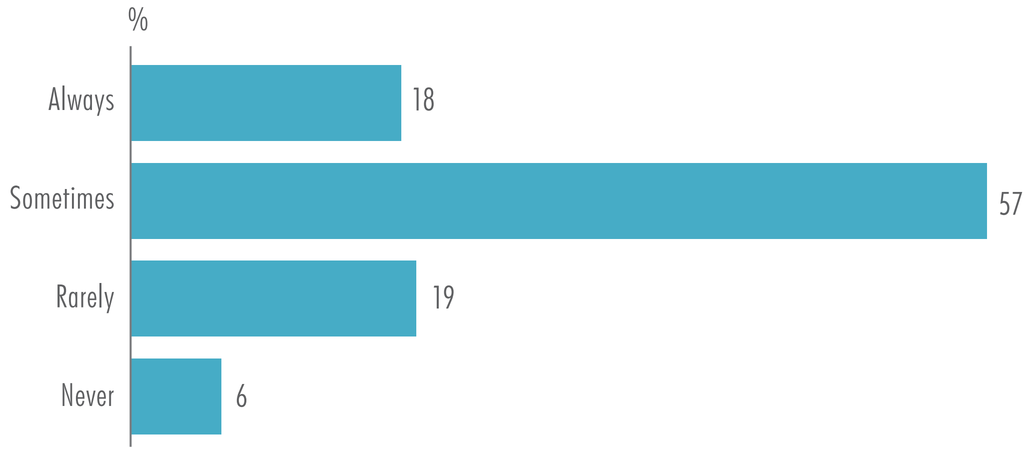
Those visiting weekly were significantly twice more likely to say they were motivated by 'shopping', 35%. Followed by 'getting out of the house', 15%, 'to socialize with friends' 12% and 'me time' 11%.

Those visiting fortnightly were more likely to say the motivation was 'shopping' 42%, 'me time' 13% and 'just getting out of the house' 13%. Those visiting monthly or every couple of months were more likely to say the motivation was' shopping' 46%,'socializing' 11%, a 'family outing' 10% 'just getting out of the house' 10%.

OTHER ACTIVITIES

Respondents were asked how often their visits to large town or city centres or out of town shopping centre/malls shopping trips also included other activities like going to the cinema, going to a pub/bar, eating at a restaurant, live music performances, library or other leisure and cultural activities.

How often did your pre-Covid lockdown large town, city centre or out of town shopping centre/mall shopping trips also include other activities like going to the cinema, going to a pub/bar, eating at restaurant, live music performances, library or other leisure and cultural activities?



For 18%, pre-covid shopping trips always included other social activities like going to the cinema, going to a pub/bar, eating at a restaurant, live music performances, library or other leisure and cultural activities and for 57% it was sometimes. 25% of the sample were shopping purists and their attention was rarely drawn from retail.

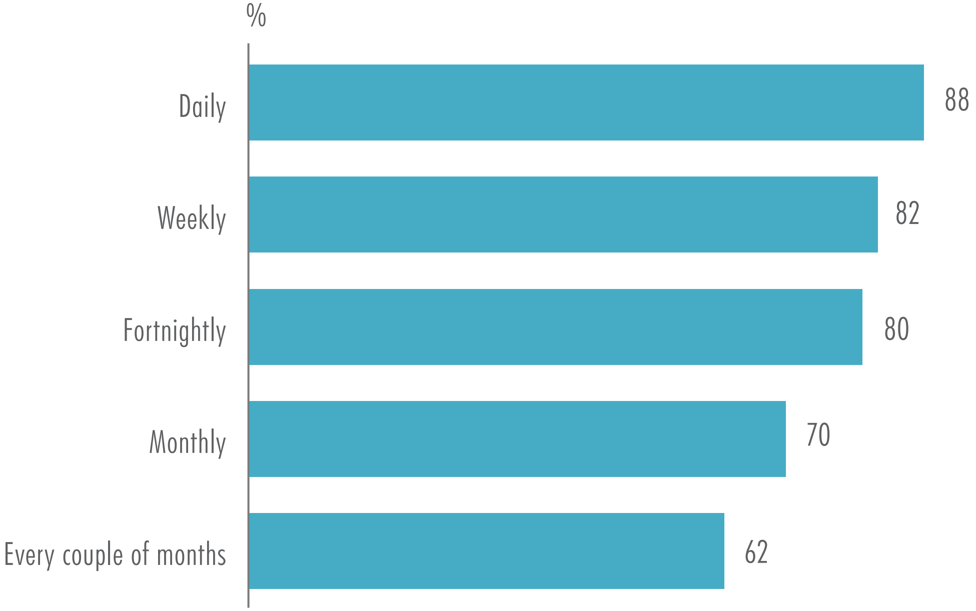
DEMOGRAPHIC VARIANCES
–OTHER ACTIVITIES

There were no significant gender variances.

Younger respondents were significantly more likely to say that pre-covid shopping trips always or sometimes included other social activities than older respondents.

Those who visit most frequently are those who are also most likely to do other things, 88% of those who visit daily and 82% of those who visit weekly.

Visit always/sometimes



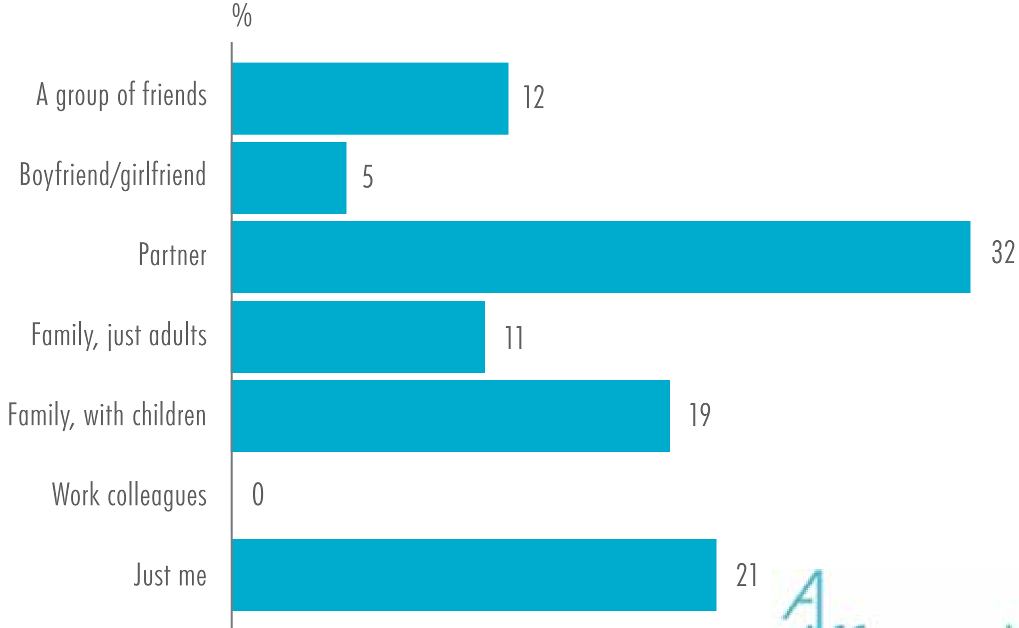
TYPICAL SHOPPING PARTY

Typically the shopping party consisted of 'partner' 32%, 'just me' 21%, 'family with children 19%, a 'group of friends' 12% and 'family, just adults' 11%.

DEMOGRAPHIC VARIANCES

Female respondents were more likely to say they were visiting with a groups of friends 14% vs 9%and family with children 23% vs 14% and family just adults 15% vs 6%.
Male respondents were more likely to say 'Partner' 41% vs 24%.

Typically, when you went shopping in large towns or city centres or out of town shopping centres/malls in pre-Covid lockdown times, who was in your shopping party?



The average party size for shopping trips was 2.

CAUSES FOR CONCERN

47% of respondents said they had Covid related concerns about visiting large towns and cities or out of town shopping centre/malls for shopping and social outings now that government restrictions are being lifted.

Do you have any Covid related concerns about visiting large towns and cities or out of town shopping centres/malls for shopping and social outings now that government restrictions are being lifted?

OTHERS NOT WEARING MASKS	80%
CROWDS	79%
LACK OF SOCIAL DISTANCING SPACES	75%
PEOPLE SOCIAL DISTANCING	63%
PEOPLE TOUCHING PRODUCTS	50%
PUBLIC TOILET HYGIENE	48%
OTHERS TRYING ON CLOTHES	32%

DEMOGRAPHIC VARIANCES –CAUSES FOR CONCERN

Females are more likely to be concerned over others not wearing masks 83% vs 76%, crowds, 82% vs 76%, lack of social distancing spaces, 78% vs 72%, public toilet hygiene 52% vs 43%, others trying on clothes 38% vs 23%.

Older respondents 46 to 55 and 55+ are significantly more likely to have concerns about crowds 85% and 88%, others not wearing masks 87%, lack of social distancing spaces 81% and general social distancing 70%.

Younger respondents in all age categories are less likely to have concerns in most cases except 36 to 45's for people social distancing 64% vs 63% and others trying on clothes 35% vs 32%.

Those in the 18 to 25 age group are significantly below the average for all options with the exception of concerns public toilet hygiene 57%, and their major concern is lack of social distancing spaces 64% followed by others not wearing masks 60%.

Otherwise, in most cases concern rise with age and the most consistent concern across the age groups is public toilet hygiene at close to half of all concerned shoppers.

SHOPPING ONLINE

Respondents were asked if their online shopping had increased or decreased during lockdowns compared to the 18 months before lockdowns.

67%	SAID THAT THAT THEIR SHOPPING HAD INCREASED TO SOME DEGREE

Within that

9%	SAID THAT THEY NOW DO ALL OF THEIR SHOPPING ONLINE
30%	SAID THEIR ONLINE SHOPPING HAD INCREASED A LOT
28%	THEIR ONLINE SHOPPING HAD INCREASED A BIT.

DEMOGRAPHIC VARIANCES –SHOPPING ONLINE

Female respondents were more likely to say that their online shopping had increased 70% vs 64.

The biggest increases in online shopping came in the '26 and above groups' all around 70%. In the 18 to 25 age group the increase was lower at 60%, as would be expected.

The daily visitors to city centres and town shops, were the least likely to say that their online shopping had increased 54%, and for all other shopping frequency groups the average increased to around 67%.

ONLINE SHOPPING AFTER 19/07

We asked respondents what they expected to do after 19/07.
The sample is fairly evenly mixed overall with 71% saying that they expect to do all, most or an equal mix of online and visiting shops, and 64% saying they will do all of their shopping visiting shops, do most of their shopping visiting shops or do an equal mix of online and visiting shops.
8% say that they were not sure.

What do you think you are LIKELY to do after lockdown restrictions are fully lifted on 19th July 2021?

	%
Do all of my shopping online	4
Do most of my shopping online	25
Do an equal mix of online shopping and visiting shops	42
Do most of my shopping by visiting shops	17
Do all of my shopping by visiting shops	5
Not sure as yet	8

DEMOGRAPHIC VARIANCES –ONLINE SHOPPING AFTER 19/07

Female respondents are more likely to say that they will increase their online shopping or do an equal mix of online and visiting shops 72% and less likely to say that they will do an equal mix of online and visiting shops or most or all of their shopping in shops, 61%.

	Male	Female
Bias to online	25	32
Equal mix online/instore	43	40
Bias to instore	24	21

A different view

Older respondents 55+ are the least likely to say they will do their shopping online or an equal mix of online and in-store 57%. And more likely to say they will do more of their shopping instore or an equal mix 64%. 13% of the older age group said that they are unsure as yet.

Those in the 26 to 55 age groups are most likely to say that they will do their shopping online or an equal mix of online and in-store 82%.

	18 - 25	26 - 35	36 - 45	46 - 55	55+
Bias to online	29	31	35	28	23
Equal mix online/offline	41	50	44	46	34
Bias to instore	22	15	15	20	30
Not sure yet	9	3	6	6	13

Those who shop in towns/cities only monthly or less than that, are most likely to shop online after 19/07 and least likely to say that they will do an equal mix of online and instore shopping.

The daily shoppers are most likely to say that they will do a mix of online and instore 53% but even with this group, more are likely to say that on balance their shopping will be an equal mix.

	Daily	Weekly	Fortnightly	Monthly	Every couple of months
Bias to online	23	29	26	27	32
Equal online and instore	53	41	43	42	38
Bias to instore	14	25	23	24	20

The survey then explored what might attract them to visit a city centre more frequently.

FREE ATTRACTIONS

The sample were asked which from a list of options of '**free to view**' events taking place in a large town, city centre or out of town shopping centre/ mall would attract them to visit more frequently than they did before Covid lockdowns:

	%
Different types of open air markets or fairs e.g craft makers, art, antiques, local produce	39
Local exhibitions e.g. gardening, craft making, art, local history	28
Free to view live music events	25
Street entertainers	15
Pop-in classes e.g. dance, craft making, art making, playing a musical instrument	13
Children's learning and making activities	12
Storytelling	7
None of the these	42

DEMOGRAPHIC VARIANCES –FREE ATTRACTIONS

Female respondents are more likely than males to be influenced to visit a large town or city more frequently for all of the activities with the exception of story-telling, though the difference is not significant.

Female respondents say they are most likely to be influenced by, free to view live music 30% vs 20%, different types of open air markets, 45% vs 32%, pop in classes 16% vs 10%.

Older respondents are more likely than the younger to be influenced by different types of open air markets and fairs 41% and local exhibitions 28%.

Free to view live music events peak in interest with those 36 to 45 at 36% and local exhibitions and open air markets are the consistently popular across the age groups though peaking with older age groups at 41%.

We can see how free to view events are likely to attract by frequency of visiting.

Average influence on visiting

There are three stand out categories of free attractions:

	Free to view Live music events	Different types of open air markets	Local exhibitions
Daily	35%	32%	26%
Weekly	30%	42%	30%
Fortnightly	22%	42%	31%
Monthly	23%	39%	28%
Every couple of months	19%	35%	23%

PAID ATTRACTIONS

The sample were asked from a list of 'Pay to Enter' events/attractions which were likely to influence them to visit large towns, city centres or out of town shopping centre/malls more often:

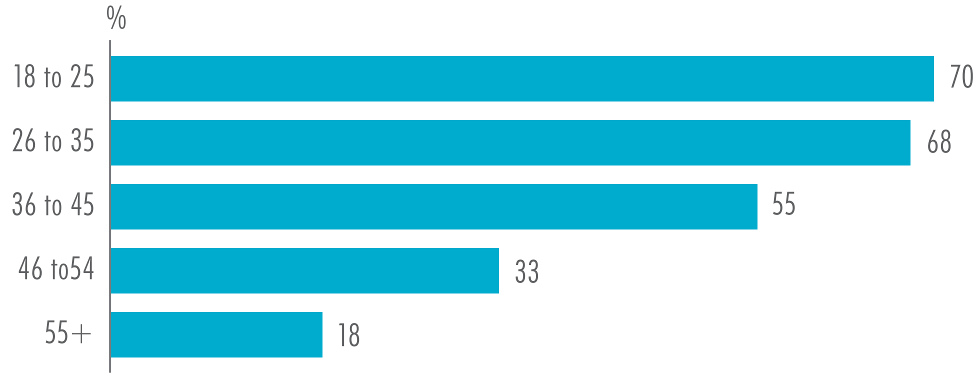
	%
Family entertainment centre	17
Mini/crazy-golf	14
Aquarium	14
Bowling	13
Adults game bar- axe throwing, beer pong, shuffleboard, skee-ball etc	10
Urban golf (Indoor golf simulator, Bar, Food)	8
Art/craft workshops	8
Childrens's soft play centre	8
Extreme sports experiences – e.g. bungee jumping, wall climbing	7
Flight Club (Darts bar)	5
None of these	60

DEMOGRAPHIC VARIANCES –PAID ATTRACTIONS

The only statistically significant difference is that female respondents are more likely to say they would be influenced by paid for family entertainment centres 19% vs 14%.

A high 82% of the older 55+ respondents would not be influenced by any of the listed experiences compared to 70% in the 18 to 35 age groups who would. In each case the interest in pay to enter activities declines steadily as the respondent gets older.

Influence on visiting



Significant visit frequency variances:

	FEC	Aquarium	Mini-crazy golf
Daily	19%	16%	18%
Weekly	20%	17%	16%
Fortnightly	20%	17%	14%
Monthly	16%	13%	11%
Every couple of months	8%	7%	11%

ADDITIONAL SERVICES

The survey then explored additional services that could be offered by retailers and malls to encourage shoppers to visit more often. All options shown are things being done already by retailers and malls:

	%
Restaurant dining	30
Social spaces to sit and chat	23
Showrooms for online retailers e.g Amazon, BooHoo , Etsy	20
Click and collect centre for online retailers	18
Same day buy and home delivery	18
Live music	17
Greater variety of fast food outlets	17
Centralized returns for all shops	16
Drive by pick up zones to collect shopping	13
After work and night-time bars	12
Children's entertainment e.g. mini golf, art and craft making	12
Virtual reality clothing try on/fitting rooms	11
Fitness gym	10
Virtual reality clothing try on/fitting rooms	9
Aggregated pick up places for all of your town centre/city shopping	9
Virtual reality home decoration and styling	9
Digital shopping spaces with the latest viewing technology	9
Parent and toddler rest areas	7
Fashion shows/catwalk	7
Crèches for children	5
Children's gymnastic based fun	5
Presentations by famous social media influencers	4

DEMOGRAPHIC VARIANCES
–ADDITIONAL SERVICES

The only gender differences are that females would like to have 'drive by pick up zones to collect shopping' 16% vs 10% and males would like to have 'digital shopping spaces with the latest viewing technology' 11% vs 7%.

Older respondents are most likely to be influenced by, 'restaurant dining' 26%, 'social spaces to sit and chat' 21% and 'same day buy and home delivery', 15% and a greater variety of 'fast food outlets', 15%.

The biggest demand comes from the 26 to 35 age groups and especially where children are involved.

Peak child related additional services:

	26 to 35
Social spaces to sit and chat	29%
Children's entertainment	21%
Parent and toddler rest area	20%
Crèches for children	13%
Children's gymnastic based fun	12%

Lifestyle related additional services:

	26 to 35
Restaurant dining	35%
Social spaces to sit and chat	29%
Greater variety of fast food outlets	22%
Fitness gym	22%
Live music	22%
After work and night-time bars	20%
Social media influencers	13%
Fashion catwalk	13%

Shopping related additional services:

	26 to 35
Showrooms online retailers, Amazon, BooHoo, Etsy	33%
Click and collect online retailers	23%
Centralized returns for all retailers	22%
Same day buy and home delivery	20%
Drive by pick up zones to collect shopping	20%
Virtual reality clothing try on/fitting rooms	15%

POP UP SHOPS

The surveys then examined the concept of which from a list of pop up shops would influence shoppers to visit more often:

	%
Pop up restaurants featuring cultural diversity	24
Pop up shops for local art, craft and jewellery	20
Pop up shops for fashion clothing	16
Pop up shops for big brands like Nike, Tommy Hilfiger, Northface to showcase new products	14
Pop up shops for new gaming products like FIFA22, Animal Crossing, Mario Cart	10
Pop up shops to talk to and experience brands like Facebook, Google, Instagram, Tik Tok, Snapchat	10
Pop up shops to try a musical instrument	8
None of these	51

DEMOGRAPHIC VARIANCES –POP UP SHOPS

Female respondents are significantly more likely than males to say that 'local art, craft and jewellery' pop ups, 26% vs 13%, a 'Pop up restaurants featuring cultural diversity' 26% vs 21%, and 'fashion clothing' pop ups 22% are more likely to influence them.

It will be no surprise that those 55+ are least likely to be interested in any of the pop ups than any other age group but are most interested in 'Pop up restaurants featuring cultural diversity' 17% and 'local art, craft and jewellery' pop ups, 17%. Pop ups for new gaming products received nul point from this 55+ jury.

Overall, the interest in pop-ups declines with age with the exception of 'Pop up restaurants featuring cultural diversity' which is popular with all age groups peaking around 30% with those 18 to 45, and local art, craft and jewellry averaging around 20%.

The most consistently rated pop up is 'Pop up restaurants featuring cultural diversity' from 33% of weekly shoppers to 20% from 'every couple of months' shoppers.

Pop ups featuring local art, craft and jewellry is next averaging 20% for all visiting frequency groups followed by pop up shops for fashion clothing averaging 20% for daily, weekly and fortnightly shoppers, 14% for monthly shoppers but only 10% of 'less than that's.

ADDED INCENTIVES

Then the survey looked at which from a list of added incentives would influence shoppers to visit more often:

	%
Price comparison services so you can easily find where to get the lowest prices	26
Advice centre like Martin Lewis MoneySavingExpert	20
Tech advice for electronic devices	14
Clothing alterations	13
Clothing style advice	13
Beauty advice	11
Ability to split purchases to three equal payments over 3 months	11
An app to make shop appointments	9
Personal shopper	8
None of the these	45

DEMOGRAPHIC VARIANCES –ADDED INCENTIVES

The additional ancillary services most popular with female respondents are beauty advice 17% vs 4%, clothing style advice 15% vs 10% and clothing alterations 15% vs 11%.

Male respondents are significantly more interested in tech advice for electronic devices 21% vs 9.

Three additional ancillary services standout as being popular with all age groups equally:

Price comparison services to get the lowest prices	average 27%
Advice centre like Martin Lewis MoneySavingExpert	average 20%
Tech advice for electronic devices	average 15%

Those 18 to 25, 24% and those 26 to 35, 20% say that the 'ability to split purchases to three equal payments over 3 months' will encourage them to visit more often.

The pattern is the same when we look at the data by frequency of visiting and three services again stand out for consistency.

Price comparison services to get the lowest prices	average 27%
Advice centre like Martin Lewis MoneySavingExpert	average 20%
Tech advice for electronic devices	average 15%

For further information about ADV research or to ask about this consumer sentiment survey please contact:

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