

# Merkur Slots UK

## Footfall, Pedestrian Flow and Linked Trip Surveys SUMMARY REPORT

### Introduction

Despite the introduction of Class E and the Government's clear message that the success of our town centres is no longer about protecting traditional forms of retailing, but on introducing a wide mix of uses and experiences which attract people into centres, there is still a common view that non-retail uses are not as beneficial to town centres as retail uses, and may be harmful.

There is a common misconception that uses like Adult Gaming Centres are not complementary town centre uses and inappropriate within Primary Shopping Frontages because they do not generate the levels of footfall that retail units do, that they create 'dead frontages' leading to a fragmentation of the shopping frontage and a reduction in pedestrian flow, and do not generate linked trips.

To respond to these misconceptions, Merkur Slots commissioned ESA Retail, an independent survey company, to carry out footfall, pedestrian flow and linked trip surveys at three of their trading AGCs across England – 305 Hessle Road, Hull (District Centre), 91 High Road, Wood Green, London (Town Centre), 54 London Road North, Lowestoft (Town Centre).

These sites were chosen to ensure a good geographical spread and importantly because they are all located in Primary Shopping Frontages. ESA Retail carried out the research on Friday 24th September 2021, surveying between 9am and 6pm. It was decided to survey up until 6pm as this reflected the typical trading hours within the three centres. The weather was dry in all three locations.

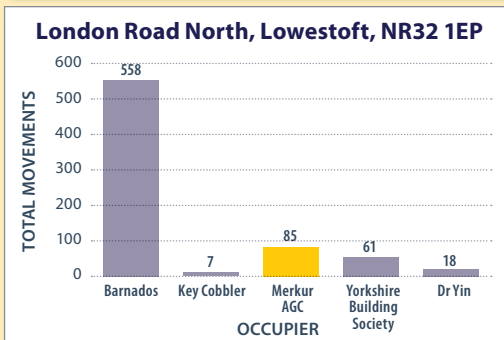
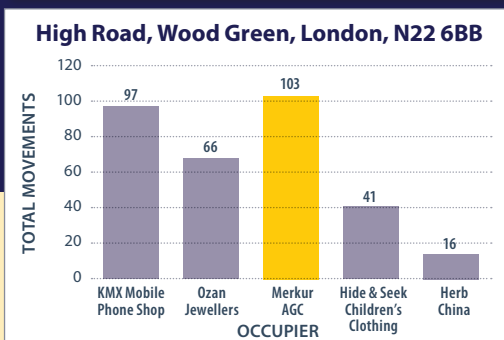
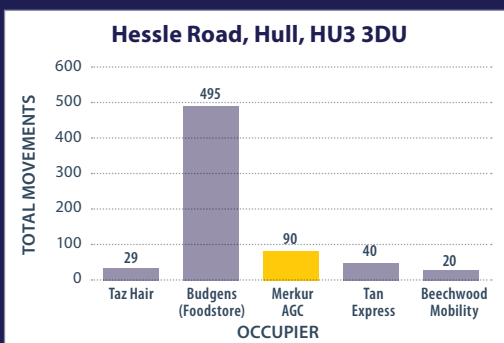
### Footfall Surveys

The number of people entering and exiting the AGC was recorded at each unit. In addition, and to provide context, the same data was collected for the two units located either side of the AGC so five units were surveyed in total. The frontages surveyed comprise a variety of independent and national operators, and predominantly retail (former A1 units).

At each location, the AGC was either the busiest or the second busiest in terms of the total number of customer movements. In Wood Green, the AGC generated more customer movements than a mobile phone shop, jewellers, clothing shop and Chinese herbal shop. The only two shops to generate higher levels of customer movements was Budgens supermarket in Hull which is to be expected and the Barnardo's Charity Shop in Lowestoft.

It is important to note that the shops with the lowest recorded movements were Beechwood Mobility (Hull), Herb China (Wood Green) and Key Cobbler (Lowestoft) - all of which are traditional A1/E retail uses. It is also interesting to note that a number of retail units did not open for the full shopping day. For instance, Key Cobbler only opened for 2 hours in the afternoon and Hide & Seek Children's Clothing did not open until 10am which is their standard opening time. Independent retailers do not always open the full shopping day/week which clearly impacts on their levels of footfall and the generation of linked trips. This is not the case for Merkur AGCs that are always open during the entire shopping day/week.

The survey results demonstrate that Merkur AGCs generate good levels of customer movement and activity in centres, which is comparable to the activity associated with traditional retail units in Primary Shopping Frontages and in some cases is significantly higher.



### Pedestrian Flow Survey

ESA Retail also carried out a Pedestrian Flow Survey of all people walking past the Merkur AGC in each location during the 9am to 6pm period. The purpose of this survey was to demonstrate that the presence of a Merkur AGC within a Primary Shopping Frontage does not lead to a fragmentation of the frontage and a sudden reduction in pedestrian flow to the detriment of the centre.

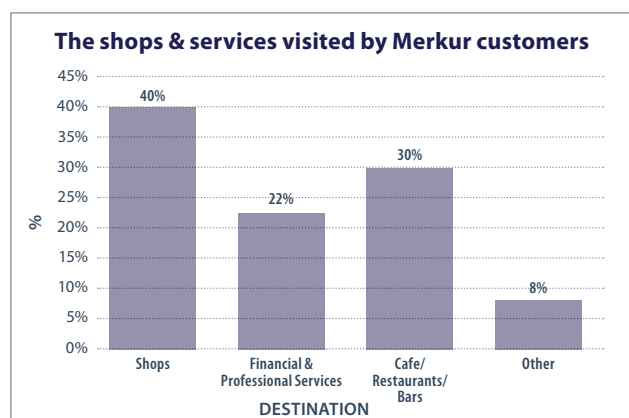
Store	Pedestrian Flow Passing Stores	
	Total Footfall	Average Footfall per hour
Hull	1581	176
Lowestoft	4421	491
Wood Green	9582	1061

The table shows that pedestrian flows past operational Merkur AGCs remain high.

### Linked Trip Surveys

Customers leaving the Merkur AGCs were asked to complete a short questionnaire. A total of 185 customers across all three locations were happy to take part in the survey. Customers were asked whether visiting the Merkur AGC was the main purpose for their visit to the centre that day. 62% said that it was, demonstrating that Merkur's AGCs can be main destinations and that the respondents may not have visited the town centre that day if Merkur was not present.

The customers were also asked whether they typically visit other shops and services as part of a trip to the Merkur AGC. 62% of respondents confirmed that they also visit other shops and services. Of this 62%, 40% said that they visit shops, 22% visit financial and professional services (i.e., banks), 30% visit cafes/restaurants/bars and 8% visit other types of services. This evidence confirms that Merkur AGCs increase the propensity of linked trips to other shops and services within centres, demonstrating the complementary role they play.



62% YES 38% NO



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Overall, the surveys demonstrate that Merkur AGCs are entirely appropriate and complementary uses within primary retail areas, which often have higher footfalls than some traditional Primary Frontage retail units. It is simply not the case that all retail units are more beneficial than all non-retail uses.

The nature of high streets has changed. Merkur AGCs attract people into centres, generate good levels of footfall, maintain high levels of pedestrian flow and generate linked trips.