
HDH Vitality Rankings 2021

February 2021

Harper Dennis Hobbs



Foreword



James Ebel
CEO

It is no surprise that Harper Dennis Hobbs' 2021 Vitality Ranking looks very different from previous years. Reflecting on our last Vitality Rankings in 2019, we discussed the changing face of the high street, and at that time, it would have been impossible to imagine the events that we faced over the last twelve months.

The 'retail health' of high streets across Great Britain has seen contrasting fortunes since the start of the COVID-19 pandemic. The pandemic's impact means that the shopping destinations that would normally occupy the upper reaches of the list have fallen and have largely been replaced by more local retail centres in prosperous areas that provide convenience and essential product categories.

It is hoped that the stronger connection to local high streets continues, but it is also important to note that the strengths of major cities and shopping districts have not simply disappeared.

The fundamental retail factors that set the major shopping destinations apart from other areas remain. We fully expect to see them return to vibrant, bustling retail centres in line with restrictions easing and consumer confidence returning.



Introduction



Andy Metherell
Head of Retail Consultancy

Our analysis is unique as we use variables that both consumers and retailers consider when assessing shopping locations to rank the top 1,000 retail centres in Great Britain. The COVID-19 outbreak and its associated restrictions have dramatically altered consumers' priorities and shopping behaviour, whilst brands are considering the prosperity of the local consumers and their likely future co-tenants when selecting new sites.

The most vital retail centres currently provide offers that are literally vital to people's lives, such as grocers, pharmacies and hardware stores. These essential retailers have been able to trade throughout the strictest lockdowns, and consumers have not been willing or able to travel far to visit them.

Shopping patterns have therefore changed significantly since the start of the pandemic, and consumers' local high streets are benefitting at the expense of major destinations.

The restrictions on movement have created extremes of experience for consumers: many have sadly lost their jobs, whilst others have been trapped at home for long periods of time and saved more money than normal (despite often seeing wage decreases). These conditions, and general uncertainty about the future, have led to most consumers spending mainly on groceries, health and the home, and centres that house retailers in these categories have therefore fared better than others.

Brands with strong online offers have performed reasonably well as shoppers have turned to the internet – the world's largest department store with each product only a couple of clicks away – during periods of lockdown. Innovation has helped some occupiers of physical space generate interest and sales. Examples of these innovations include restaurants selling high quality meals that can be cooked at home, theatre performers providing doorstep performances, and retailers having an online 'personal shopper' service where employees walk the shopfloor with camera headsets.

Few retail centres are in the same degree of prosperity as they were a year ago. Still, our 2021 Vitality Ranking, which is summarised over the following pages, demonstrates those that have retained footfall and 'retail health' to the greatest degree.



Summary of Variables

A range of variables was assessed in order to determine the vitality of centres across Great Britain in early 2021. Many of these are different from previous years to account for the impact of COVID-19 restrictions. The factors were weighted either positively or negatively, depending on the type of influence they have on footfall, to reach the final ranking order. For example, the presence of people aged 66 or over is likely to be a negative given their greater safety concerns and more restricted movement. Therefore, the variables were used to calculate a score for 1,000 retail centres across Great Britain, excluding retail parks and outlet centres but including city centres, town centres and malls, which were then used to rank each location.

Variable	Comment
Size of Retail Offer	A centre with a large amount of floorspace dedicated to retail indicates a relatively strong destination, with a wider array of choice compared to a smaller centre
Weighted Spend	A high weighted spend attracted to a retail centre denotes a large market size. Spend by tourists and workers was also considered, to highlight the impact of movement restrictions on these groups of people.
Essential Retail	A location with a high volume or proportion of essential retail, such as groceries and pharmacies, will have had more tenants able to trade for longer periods of time than the latter, given government rules.
Restricted and Non-Restricted Hospitality	Bars and nightclubs' trading has been severely restricted, meaning their presence in a centre negatively impacts its vitality. Conversely, restaurant and café offering takeaways have been able to trade, resulting in a positive impact on a centre's footfall.
Vacancy Rate	A centre with a high vacancy rate signifies decline, and also threatens its future prosperity.
Department Stores	The department store concept is under threat, and their presence increases the risk of store closures due to poor performance and administrations. Retail centres could lose key anchors create vacancy in large units that will be hard to relet.
CVAs	A centre with a high presence of retailers who have launched CVAs increases the risk of store closures, again impacting the vacancy rate
Google Mobility	Google Mobility Data monitors changes in footfall across the UK due to COVID-19. Movement has been classified into Retail & Recreation, Grocery & Pharmacy and Workplace to assess the impact on each.
Age	Catchments with a high proportion of over 66s in the local population are likely to have been impacted significantly, as this age demographic has spent more time than most shielding, reducing the centre's footfall.
Number of Cars	High car ownership signifies a greater ability to travel to retail centres, and reduce reliance on public transport. Catchments that have a high proportion of households with 2 or more cars will perform better and boost the vitality
Aspirational Retail	A sizeable provision of aspirational retail usually indicates a more pleasant shopping environment, as well as higher sales productivity levels.
Suitability to Local Consumer	The retail supply of a centre has been assessed in relation to the demands of the local customer. Centres with well-aligned centre supply and consumer demand are more successful as they better serve the needs of the local population.



Top 25

The retail locations found to be most vital as of February 2021 include smaller, more accessible town centres situated close to large cities. They have maintained relatively strong footfalls due to consumers remaining close to their homes for large parts of 2020, with few trips into workplaces or on holiday. **Shopping patterns have become very localised** – a trend that will continue for the first quarter of 2021 at the very least. Whilst most of the top 50 were in the upper echelons of the 2019 Vitality Ranking, these centres have often climbed 25 to 50 places as larger retail centres have fallen. The latter locations have all had performance hampered by a combination of: a greater exposure to brands at risk of administration; department store space which is also at risk; catering tenants that have been unable to trade; and higher proportions of footfall from residents that have to travel larger distances, workers and tourists.

Source: HDH

As the HDH Vitality Ranking is a multivariate piece of analysis, it is the overall combination of factors that produces a high or low rank. Many of the names expected to be higher – from regional city centres to major malls – suffer from the negative impact of several variables, and the highest-ranked centres benefit from multiple aspects. They often have an aspirational retail offer that is well suited to their prosperous customer base, and a good supply of essential retail and non-restricted hospitality. Affluent consumers have so far been sheltered from the negative economic impacts of the pandemic. They have been able to work at home, whilst less affluent consumers have had to go to into their places of work, as well as being more insulated from the impact of job losses.

Aspirational offers tend to be anchored by a Waitrose supermarket, and provide other essential retail like bakers, butchers and grocers. These are also complemented by cafes that have been allowed to trade through 2020, and have helped maintain a good level of footfall despite the government’s restrictions.

2021 Rank	Retail Centre	Region	2019 Rank	Change
1	Beaconsfield	South East	64	63
2	Henley-on-Thames	South East	28	26
3	Tenterden	South East	39	36
4	Wimbledon Village	Greater London Authority	7	3
5	Marlborough	South West	10	5
6	Sevenoaks	South East	30	24
7	Kingston upon Thames	Greater London Authority	20	13
8	Berkhamsted	East of England	14	6
9	Harpenden	East of England	139	130
10	Ilkley	Yorkshire and The Humber	29	19
11	Cobham	South East	17	6
12	Skipton	Yorkshire and The Humber	110	98
13	Reigate	South East	12	-1
14	Farnham	South East	75	61
15	Ringwood	South East	90	75
16	Milton Keynes	South East	58	42
17	Truro	South West	89	72
18	Chiswick	Greater London Authority	24	6
19	Beverley	Yorkshire and The Humber	70	51
20	Chester	North West	46	26
21	Hampstead	Greater London Authority	43	22
22	Muswell Hill	Greater London Authority	38	16
23	Harrogate	Yorkshire and The Humber	22	-1
24	Tunbridge Wells	South East	88	64
25	Brighton	South East	21	-4



Top 26-50

The top 25 contains a number of centres that are commuter towns for London located across the south east of England – including Beaconsfield, Henley and Wimbledon Village - and several are also found in the next 25 retail centres shown in the table below. However the top 26-50 contains a larger number of towns in other parts of the country, such as Yarm, Altrincham and Leamington Spa, from which consumers would normally travel into other major cities. This is again a result of the more restricted shopping patterns created by the pandemic, which is encouraging residents to reconnect with their local community. Consumer affluence remains a factor for the next 25 locations too, as these consumers have so far been protected from the job losses in more blue collar or service-oriented roles, whilst the retail offers are also more upmarket to meet consumer demand.

Source: HDH

The retail centres on this page – and others within the top 100 most vital locations – are more likely to have a higher proportion of space dedicated to supermarkets, and more specialist grocery offers than those in the top 25. Clitheroe, Thame and Hailsham all have a significant proportion of their space taken by these product categories, and they are the few retailers that have been able to trade for the whole of 2020. More examples are to be found in the next 50 retail centres – including Long Eaton in Nottinghamshire whose centre contains an Aldi and Tesco Extra, and Birmingham’s Aldridge suburb, where the Morrison’s contributes a large proportion of space; these brands, along with Asda and Lidl, often anchor more value-oriented retail locations.

All of these centres also benefit from other aspects, such as a low proportions of vacancy or minimal reliance on worker or tourist spend, a retail offer that is well-aligned to the demands of the local consumer. These factors can often be managed by local councils or BIDs, and now is a good time for these organisations to plan improvements for their local high streets.

2021 Rank	Retail Centre	Region	2019 Rank	Change
26	Marlow	South East	36	10
27	Market Harborough	East Midlands	119	92
28	Exeter	South West	80	52
29	Sherborne	South West	26	-3
30	Knutsford	North West	104	74
31	Stourbridge	West Midlands	260	229
32	St Albans	East of England	19	-13
33	Bath	South West	13	-20
34	Winchester	South East	61	27
35	Richmond	Greater London Authority	6	-29
36	Yarm	North East	65	29
37	Altrincham	North West	477	440
38	Heswall	North West	140	102
39	Clitheroe	North West	118	79
40	Thame	South East	162	122
41	Weybridge	South East	183	142
42	Leamington Spa	West Midlands	82	40
43	Hailsham	South East	198	155
44	Windsor	South East	53	9
45	York	Yorkshire and The Humber	47	2
46	Bromley	Greater London Authority	69	23
47	Taunton	South West	194	147
48	Guildford	South East	25	-23
49	Oxford	South East	42	-7
50	Saffron Walden	East of England	132	82



Top 50 - Locations

The geographical spread of the top 50 covers every English region, albeit being skewed towards the South. The South East has the largest proportion of retail centres within the top 50, followed by the Greater London Authority.

Despite the concentration of centres in the South, there is a higher number of retail centres in the 2021 top 50 located within the North West and Yorkshire & The Humber compared to the 2019 Vitality Index. Additionally, the 2021 top 50 includes centres in the East Midlands and North East, which had not been covered in the previous top 50.

With the restriction of movement, shopping patterns have become more localised, meaning the smaller centres have performed better across the country in the 2021 Index, whereas the 2019 Index focused more heavily on larger retail centres which attracted shoppers from greater catchments. Therefore, there has been a greater emphasis on a wider geographical spread across England.

Top 50 Locations 2021



Case Study: Altrincham

Altrincham sits at 37th place in the 2021 Vitality Index, rising 440 places since 2019. This is the largest increase in rank witnessed in the top 50, and there are valid reasons for this jump.

In 2010, Altrincham was labelled a 'ghost town', with one of the UK's highest vacancy rates at 30%. A combination of high business rates, parking charges and the nearby Trafford Centre drawing customers away, all contributed to the town's decline. Trafford Council therefore undertook to regenerate the town, focusing on increasing dwell time, spend and footfall.

£60 million has been invested to date, including the refurbishment of the market, transport interchange and other public realm improvements. A loan scheme has been introduced directed towards new businesses, aiming to instil confidence for both businesses and investors. The affluent local consumer has also attracted aspirational brands like Flannels, and therefore drawn consumers back to the town. As a result, Altrincham has an improved shopping environment and subsequently footfall has increased 11.4% since 2015.



HDH Sector Commentary



Dan Hildyard
Head of UK Retail

More restricted consumer shopping habits have had an enormous impact on the relative success of high streets this year, with a shift to home working encouraging residents to reconnect with their local community. Affluence is clearly a factor here as well, with some consumers protected from job losses seen in other industries.

While city centre destinations have suffered from travel restrictions and the absence of office workers, the fundamental strengths of these locations remain and we expect them to bounce back over the course of this year in line with restrictions being eased and consumer confidence in the economy and personal safety rising. These centres are also leisure and culture hot spots which many will be looking forward to returning to when it is safe to do so.



Simon Carson
Head of Leisure

There is no doubting that events of the last year have hit the hospitality industry hard, but our analysis shows the importance of hospitality venues to the health of our high street. While restaurants have been forced to close their doors for periods, many have started a takeaway service and these businesses, as well as those existing cafés and takeaways which have remained open throughout, have been the major draw of footfall to high streets. Centres with a high proportion of takeaways and cafés have proved to be more vital, particularly with consumers spending significantly more time in their local communities.

On the other hand, the retail centres with a high proportion of large restaurants, bars and nightclubs have suffered from major restrictions to trading – however it is important to note that the fundamental factors behind these areas’ success in previous years remain and we expect them to bounce back over the course of this year in line with restrictions being eased and consumer confidence rising.



Analysis of Results – 2019 Top 50

The 50 most vital retail centres in the 2019 Vitality Rankings included many city centres and out of town malls – a depiction not replicated in the 2021 rankings. Whilst some centres remain in the top 50 of the 2021 rankings, the majority have decreased in ranking position by a considerable amount due to the restrictions related to COVID-19. Notable falls include Canary Wharf, Meadowhall and Birmingham city centre, and these reflect the impact of: decreases in the number of worker, tourist and local resident visits; increasing vacancy rates; and exposure to brands that are at risk of administration or store closures. The retail centres that have increased in ranking most significantly include smaller towns whose inhabitants have remained in the local area to a much greater degree since the start of the pandemic.

2019 Ranking	Plan Name	2021 Ranking	Change
1	Cambridge	84	-83
2	Westfield London	205	-203
3	Knightsbridge	330	-327
4	Chelsea	247	-243
5	Bluewater	204	-199
6	Richmond	35	-29
7	Wimbledon Village	4	3
8	Canary Wharf	539	-531
9	London West End	348	-339
10	Marlborough	5	5
11	Westfield Stratford City	230	-219
12	Reigate	13	-1
13	Bath	33	-20
14	Berkhamsted	8	6
15	Edinburgh	314	-299
16	Sloane Street	210	-194
17	Cobham	11	6
18	Cribbs Causeway	326	-308
19	St Albans	32	-13
20	Kingston upon Thames	7	13
21	Brighton	25	-4
22	Harrogate	23	-1
23	Meadowhall	472	-449
24	Chiswick	18	6
25	Guildford	48	-23

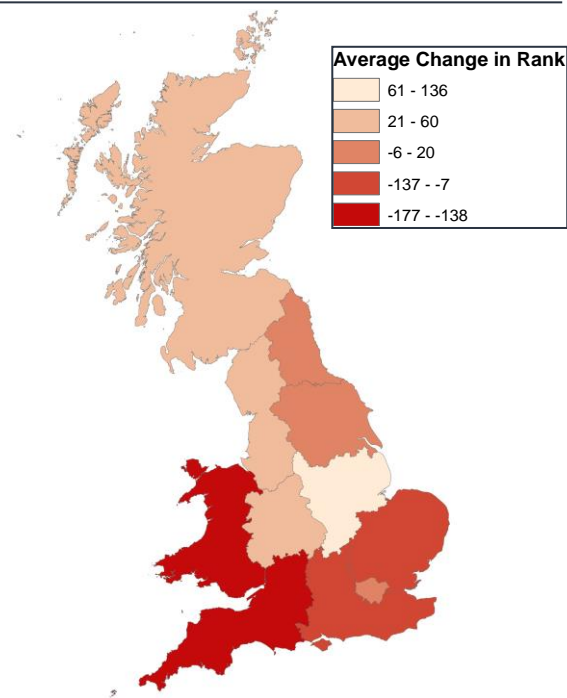
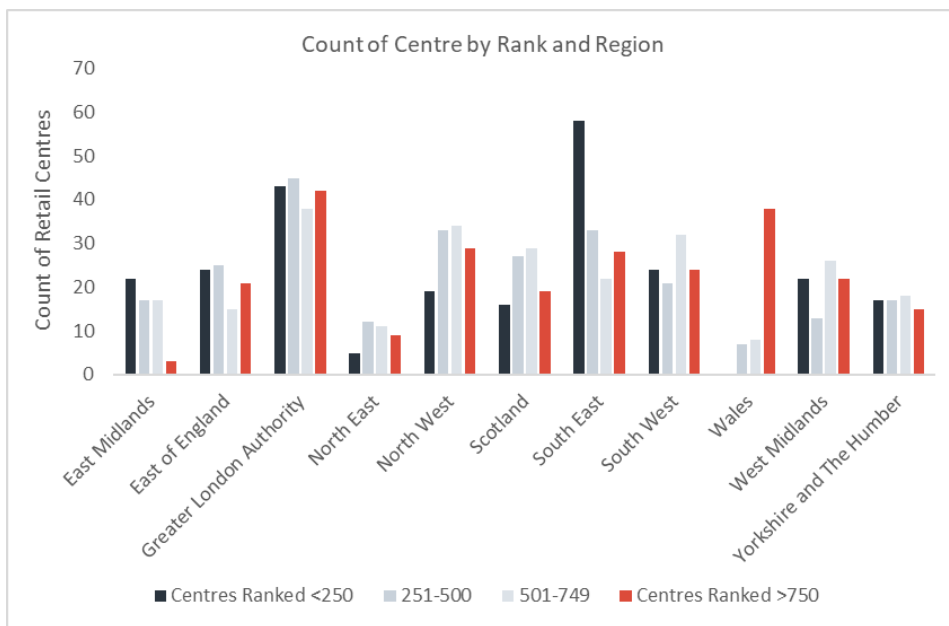
2019 Ranking	Plan Name	2021 Ranking	Change
26	Sherborne	29	-3
27	Bristol - Clifton	575	-548
28	Henley-on-Thames	2	26
29	Ilkley	10	19
30	Sevenoaks	6	24
31	Birmingham	485	-454
32	Chichester	162	-130
33	Glasgow	365	-332
34	Leeds	225	-191
35	Islington - Upper Street	161	-126
36	Marlow	26	10
37	King's Cross	367	-330
38	Muswell Hill	22	16
39	Tenterden	3	36
40	Kensington	338	-298
41	Fulham Road	127	-86
42	Oxford	49	-7
43	Hampstead	21	22
44	Trafford Centre	266	-222
45	St Ives (Cornwall)	332	-287
46	Chester	20	26
47	York	45	2
48	Liverpool	306	-258
49	Lakeside	270	-221
50	Manchester	349	-299



Analysis of Results by Region

The chart to the left below divides retail centres by region, and aggregates the number of retail centres by rank quartiles. This is to understand the regional variations in the 2021 Vitality Rankings and to show whether certain regions are more vital than others. The South East has the largest amount of retail centres with a ranking below 250, meaning it is the region with the highest number of vital retail centres. Conversely, there are no retail centres in Wales with a ranking below 250, with the majority of Welsh retail centres ranking above 750th.

The graph to the right below illustrates the regional change in average ranking since the 2019 Vitality Index, with the darker colours indicating a fall in average position. The East Midlands is the region that has increased its average ranking position the most since 2019. That being said, it is clear that more northerly regions have increased their average ranking position since 2019, whilst Wales and the South West have fallen to the greatest degree on average.

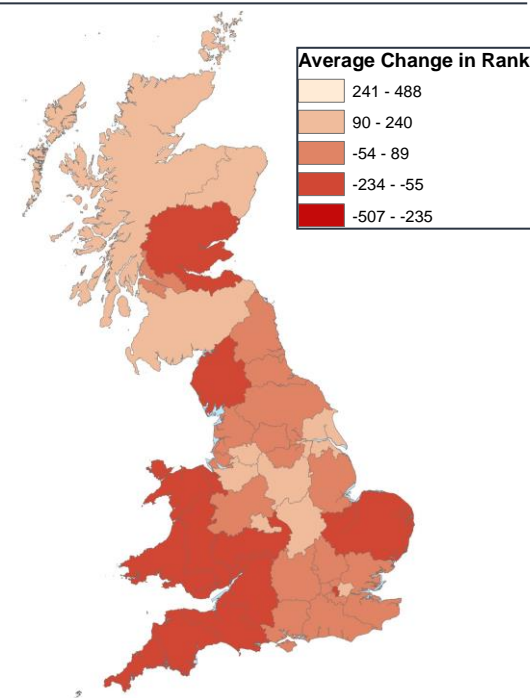


Region	Average 2021 Rank	Average 2019 Rank	Average Change
East Midlands	385	521	136
East of England	453	446	-7
Greater London Authority	497	510	13
North East	541	561	20
North West	529	589	60
Scotland	525	562	37
South East	399	381	-18
South West	520	381	-138
Wales	797	621	-177
West Midlands	523	570	47
Yorkshire and The Humber	489	508	19



Analysis of Results by County/Urban Area

Illustrating the variation in performance at county level helps to understand which specific areas are driving regional performance. We can see that centres in East Wales have fallen in average rank further than those in West Wales, and therefore the decrease in Wales's average ranking position is being fueled mostly by the former area. Similarly, centres in Derbyshire and Nottinghamshire are driving the East Midlands increase in average ranking. Inner London centres have seen significant falls in rank as commuters and tourists have not visited these areas in their usual numbers, whilst outer London areas have seen increases in rank on average.



Region	Average 2021	Average 2019	Average
	Rank	Rank	Change
Bedfordshire and Hertfordshire	361	390	29
Berkshire, Buckinghamshire and Oxfordshire	334	307	-27
Cheshire	335	482	146
Cornwall and Isles of Scilly	455	395	-61
Cumbria	642	444	-198
Derbyshire and Nottinghamshire	395	578	183
Devon	601	395	-207
Dorset and Somerset	471	341	-130
East Anglia	535	469	-66
East London	547	643	96
East Wales	828	599	-229
East Yorkshire and Northern Lincolnshire	423	594	172
Eastern Scotland	592	513	-79
Essex	436	478	42
Gloucestershire, Wiltshire and Bath/Bristol area	532	399	-134
Greater Manchester	531	640	109
Hampshire and Isle of Wight	467	441	-26
Herefordshire, Worcestershire and Warwickshire	501	424	-76
Highlands and Islands	278	473	195
Inner London	505	385	-120
Kent	388	436	47
Lancashire	504	582	78
Leicestershire, Rutland and Northamptonshire	378	499	122
Lincolnshire	377	429	52
Merseyside	594	650	56
North Eastern Scotland	350	568	219
North London	489	555	66

Region	Average 2021	Average 2019	Average
	Rank	Rank	Change
North Yorkshire	411	360	-51
Northumberland and Tyne and Wear	576	540	-36
Shropshire and Staffordshire	594	627	33
South London	381	396	14
South Yorkshire	602	556	-46
Southern Scotland	493	618	125
Surrey, East and West Sussex	401	354	-47
Tees Valley and Durham	504	583	79
West Central Scotland	566	622	56
West London	569	586	17
West Midlands	487	614	128
West Wales	786	628	-158
West Yorkshire	514	509	-5



Top 5 Centres by Region

Analysis of the top 5 centres by region depicts a clear trend; one showing that the highest ranked centres in each region consist mostly of Small and Medium Towns. This is in line with the reduced footfalls in City Centres during the past year. Affluent towns have performed better in the 2021 Vitality Index, as well as towns with a high proportion of essential retail. The North West is the only region where a City Centre location has been ranked the most vital retail centre in the region – Chester, from which people would usually commute to or shop in larger cities nearby.

Region Rank	Retail Centre	Region	Centre Type
1	Berkhamsted	East of England	Town - Small
2	Harpenden	East of England	Town - Small
3	St Albans	East of England	Town - Medium
4	Saffron Walden	East of England	Town - Small
5	Holt	East of England	Neighbourhood

Region Rank	Retail Centre	Region	Centre Type
1	Market Harborough	East Midlands	Town - Medium
2	Stamford	East Midlands	Town - Medium
3	Long Eaton	East Midlands	Town - Medium
4	Weston Favell	East Midlands	Town - Small
5	Newark On Trent	East Midlands	Town - Medium

Region Rank	Retail Centre	Region	Centre Type
1	Wimbledon Village	Greater London Authority	London District
2	Kingston upon Thames	Greater London Authority	Town - Large
3	Chiswick	Greater London Authority	London District
4	Hampstead	Greater London Authority	London District
5	Muswell Hill	Greater London Authority	London District

Region Rank	Retail Centre	Region	Centre Type
1	Yarm	North East	Neighbourhood
2	Guisborough	North East	Town - Small
3	Washington	North East	Town - Medium
4	Chester-le-Street	North East	Town - Medium
5	Wallsend	North East	Town - Small

Region Rank	Retail Centre	Region	Centre Type
1	Chester	North West	City Centre
2	Knutsford	North West	Town - Small
3	Altrincham	North West	Town - Medium
4	Heswall	North West	Town - Small
5	Clitheroe	North West	Town - Small

Region Rank	Retail Centre	Region	Centre Type
1	Galashiels	Scotland	Town - Medium
2	Inverness	Scotland	Town - Large
3	Peebles	Scotland	Town - Small
4	Elgin	Scotland	Town - Medium
5	Dingwall	Scotland	Town - Small

Source: HDH



Top 5 Centres by Region

The trend continues with the following regions. Notably, the top 5 retail centres in the South East consists entirely of Small Towns, reflecting the increased footfall in commuter towns following the restrictions of travel into London. The South West, Wales and Yorkshire & The Humber all have a presence of City Centres in their top 5 retail centres. Although Wales' largest retail centre, Cardiff, appears in the top 5, the City Centres within the South West and Yorkshire & The Humber are smaller affluent city centres.

Region Rank	Retail Centre	Region	Centre Type
1	Beaconsfield	South East	Town - Small
2	Henley-on-Thames	South East	Town - Small
3	Tenterden	South East	Town - Small
4	Sevenoaks	South East	Town - Small
5	Cobham	South East	Town - Small

Region Rank	Retail Centre	Region	Centre Type
1	Marlborough	South West	Town - Small
2	Truro	South West	Town - Large
3	Exeter	South West	City Centre
4	Sherborne	South West	Town - Small
5	Bath	South West	City Centre

Region Rank	Retail Centre	Region	Centre Type
1	Prestatyn	Wales	Town - Small
2	Ruthin	Wales	Neighbourhood
3	Monmouth	Wales	Town - Small
4	Blackwood	Wales	Town - Medium
5	Cardiff	Wales	City Centre

Region Rank	Retail Centre	Region	Centre Type
1	Stourbridge	West Midlands	Town - Medium
2	Leamington Spa	West Midlands	Town - Large
3	Great Malvern	West Midlands	Town - Small
4	Ludlow	West Midlands	Town - Small
5	Aldridge	West Midlands	Town - Small

Region Rank	Retail Centre	Region	Centre Type
1	Ilkley	Yorkshire and The Humber	Town - Small
2	Skipton	Yorkshire and The Humber	Town - Medium
3	Beverley	Yorkshire and The Humber	Town - Medium
4	Harrogate	Yorkshire and The Humber	Town - Large
5	York	Yorkshire and The Humber	City Centre

Source: HDH



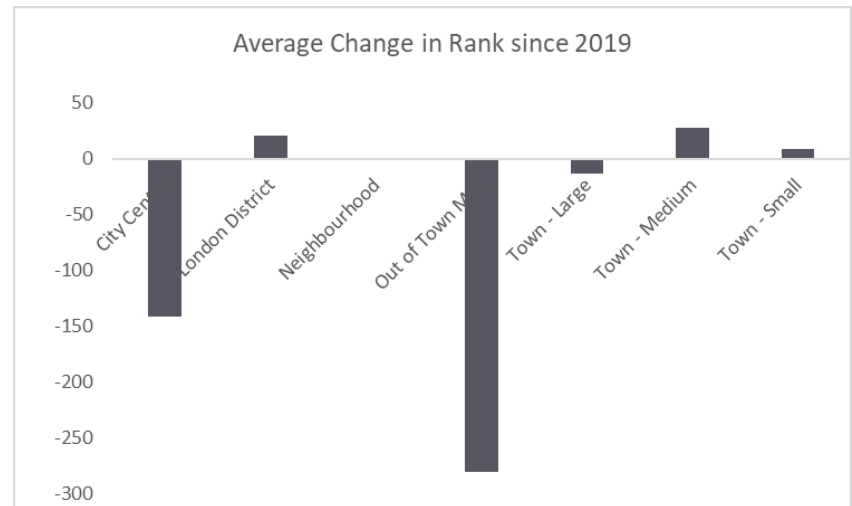
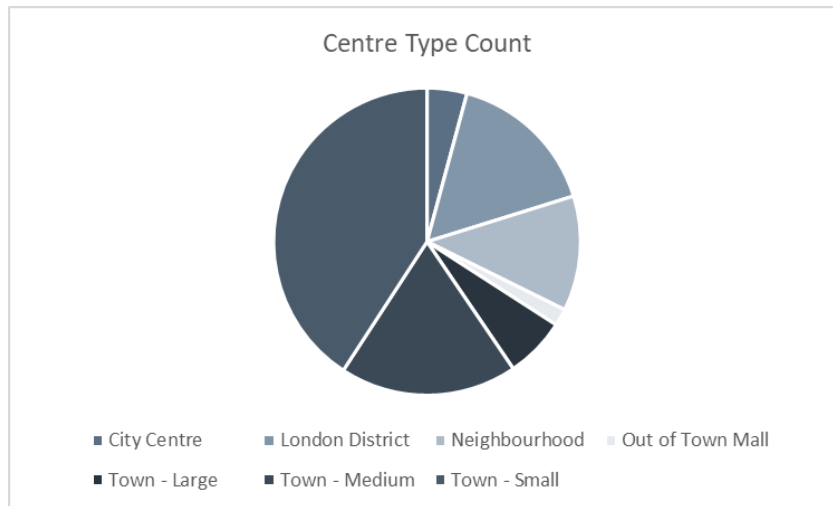
Analysis of Results by Centre Type

Whilst City Centres, Large Towns and Out of Town Malls respectively attained the highest average rankings in 2021, they have also fallen to the greatest degree due to the impacts of Covid-19 restrictions.

Those seeing increases in their average rankings since 2019 include Medium Towns, London Districts and Small Towns, demonstrating the localised shopping patterns witnessed in 2020.

Neighbourhoods have remained in the same position, suggesting that these centres continued to operate as important local hubs for the population, and were less affected by the impacts of the pandemic.

Centre Type	Count	Average Rank	Average Change
City Centre	42	310	-142
London District	160	512	21
Neighbourhood	121	570	0
Out of Town Mall	18	434	-281
Town - Large	64	413	-13
Town - Medium	187	508	28
Town - Small	408	508	8



Source: HDH



Conclusion



2020 was a year of uncertainty and disruption, as governments, occupiers, landlords and consumers tried to find the balance between protecting people's health and maintaining some semblance of normal life. These tensions are reflected in our much-changed Vitality Rankings as of February 2021.

The vaccines provide hope for the future, as they are the only real solution to the pandemic. They will allow the easing of the restrictions on consumer movement that is required for retail centres to function as they usually would. However, it would still be advisable to plan for reduced trading for much of 2021: the vaccine roll-out will take time, and there are still likely to be spikes in infections after periods of relaxation.

Consumers have had to behave in very different ways – barely leaving the home at times, avoiding contact with family and friends, and only ordering products or food online – and this will continue as we start 2021 with another lockdown. Some changes in behaviour will become normalised: whilst many are keen to return to restaurants and shopping centres as quickly as possible, the pandemic has accelerated trends that were already happening such as increasing levels of online shopping. The desire for more differentiated retail will also increase, as the negative impacts on the economy will lead to greater demand for value retail, whilst those that have maintained their income might treat themselves with aspirational products. In the entertainment sector, the simultaneous release of films online and in cinemas may reduce the numbers of people attending physical showings, although it is unlikely to replace the desire for the cinematic experience.

There are likely to be specific product categories that over-perform when life does return to a semblance of normality. Homewares and DIY stores saw robust levels of sales during 2020's spring lockdown, when consumers undertook home improvements to make their environment more comfortable. Similarly, demand for makeup, smarter clothing and leisure will be heightened after the end of restrictions, as people socialise once again with friends and family. However, the overall impact of the pandemic will be the reduced demand for retail space, as brands close stores after lease expiries and through managed administrations, or cease trading in extreme cases. Vacancy rates will increase across all types of retail centres – from major regional destinations to local high streets – as the UK's over-saturation of shopping space is brought to the fore.

During the 'waves of creative destruction' that are created by recessions and other extreme events, organisations need to take stock, streamline where needed and invest where possible. Retailers can exit stores located in unsuitable markets, or open in new locations if they are in a strong financial position. Town centres can be beautified, with unproductive space repurposed to better align the retail offer with the needs of local shoppers and excess retail converted to other uses. The government also has a role to play, by revisiting the business rates issue to both modernise the way of assessing units and create a level playing field with retailers, which would add to their supportive actions, such as the job retention scheme, altering change-of-use rules and funding for high street improvements.

The high street also has a part to play in the recovery, and vacant units could house vaccine centres to help boost footfall and recreate previous shopping patterns. Although the current situation is tough for everyone, retail's stakeholders can use this period to improve their offers and prepare for the time when life can return to normal – something we are all looking forward to.



Appendix: Detailed Description of Variables



Vitality Index Variables

Essential Retail

A defining feature for retail in 2020 was the classification of essential and non-essential shops. Essential retail, such as grocery and DIY, continued to trade throughout lockdowns, whereas non-essential stores suffered from long-term closures. This variable considers the overall amount of essential retail space, and its proportion to the total available floorspace.

Those centres with high proportions of essential retail have fared better and have proved more vital than those with a higher ratio of non-essential stores.

Higher proportions of essential retail tend to be found in smaller towns or suburbs of larger towns, where large supermarkets are located in addition to other grocery stores. This has meant that smaller locations that contain a grocery superstore have scored highly on this variable. The top 5 in this category have either a significant presence of different essential retailers, or a very large superstore located in the centre



Retail Centre	Essential Retail % of Total Floorspace
Southampton - Portswood	56%
Oadby	54%
Prestwich Village	54%
Rawtenstall	52%
Hoddesdon	51%



Vitality Index Variables

Hospitality

As with comparison retail, the hospitality industry suffered massively throughout 2020 lockdowns. Whilst bars and nightclubs have mostly remained closed since March 2020, restaurants were able to open their doors in the summer, benefitted from the government's Eat Out to Help Out scheme introduced in August, and could also sell takeaways. Despite this, these types of venues had restricted trading throughout the year.

Takeaways have remained open and cafés began to operate a takeaway-only service during the lockdowns. Centres with a high proportion of takeaways and cafés have therefore proved to be more vital, as consumers would visit these locations to benefit from the open services.

Conversely, retail centres with a large number of bars and nightclubs have been weighted negatively, as their temporary closure has weakened the offer available for visitors and not been able to attract spend as they would normally do.



Retail Centre	Restricted Hospitality % of Total Floorspace
Sheffield - Devonshire Quarter	56%
Bristol - Baldwin Street	43%
Gloucester Road	42%
London Bridge	41%
Southampton - London Road	41%

Retail Centre	Non-Restricted Hospitality % of Total Floorspace
Wimbledon Village	19%
Sloane Street	12%
Gants Hill	10%
Leicester - Narborough Road	10%
Norbury	9%



Vitality Index Variables

Vacancy Rate

Not only do vacant units harm the aesthetic of a retail centre but they can also signify a centre's decline, and thus act as a catalyst for other brands to leave. This trend might be more visible following the departure of key anchors, such as department stores and well-known brands, and could be the long-term consequences of Debenhams' and Arcadia Group's administrations.

Higher quantities of vacancy tend to be found in the centres such as cities and large towns, where there is now too much physical retail compared to local demand. Those with the highest proportions of vacant space are mainly located in the North West of England, as well as Kirkcaldy in Scotland.

In shopping malls, where the entire property is owned by a single entity, vacancy rates tend to be lower as the landlord can be more compromising on rents to better curate the retail mix.



Retail Centre	Vacancy Rate %
Skelmersdale	39%
Stretford	38%
Walkden	38%
Kirkcaldy	33%
Prescot	33%



Vitality Index Variables

Department Stores and CVAs

The downfall of department stores accelerated in 2020, with brands such as Debenhams going into administration. Over the past few years, department stores have ceased trading in some centres, causing devastating effects for some smaller towns whose retail offer relied on the presence of large anchor stores.

Aside from department stores, many other types of retailers have launched CVAs – often accelerated by the impact of the pandemic on footfall figures. The presence of brands that have entered administration increases the risk of vacancy and therefore has a negative effect on a retail centre, due to the possibility that the brand will cease trading, thus limiting the vitality.

Shopping centres have ranked highly for the presence of both department stores and CVAs, which has reduced their vitality in our scoring.



Retail Centre	Department Stores % of Total Floorspace
Brent Cross	41%
Welwyn Garden City	40%
Trafford Centre	28%
Kingston upon Thames	24%
Cribbs Causeway	23%

Retail Centre	CVA Units % of Total Floorspace
Lakeside	28%
White Rose	27%
Meadowhall	26%
Ocean Terminal	25%
Cambridge – Grafton Centre	23%



Vitality Index Variables

Size of Retail Offer and Weighted Spend

A large amount of retail, in terms of square footage, and a high weighted spend can both reflect the strength of a retail centre. Consumers have more choice in bigger centres and are likely to visit on destination-led shopping trips. More aspirational retail brands tend to locate in the larger centres, meaning spend per item is higher.

The amount of total spend deriving from tourists and workers has also been taken into account in the 2021 Vitality Rankings, both bearing a negative impact on the rankings. The lack of movement from consumers has meant that retail centres have lost out on spend from these cohorts.

Therefore, having a retail centre that is not largely dependent on the income from tourists and workers, and having a high concentration of retail, helps to boost the vitality of a centre.



Retail Centre	Retail Square Foot
London West End	15.8m
Manchester Central	6.2m
Glasgow Central	5.9m
Birmingham Central	5.0m
Nottingham Central	4.1m

Retail Centre	Weighted Spend
London West End	£18.0 billion
Glasgow Central	£5.4 billion
Birmingham Central	£4.5 billion
Manchester Central	£4.3 billion
Leeds - Central	£3.8 billion



Vitality Index Variables

Google Mobility Data

Google Mobility Data monitors the overall change in footfall due to COVID-19 across retail, residential and workplace destinations. The figures are benchmarked against a baseline day between January and February 2020 – a period that didn't suffer from any form of lockdown or restrictions. From this data, we can take an average change in mobility for a geographical location.

In the 2021 Vitality Rankings, both Retail & Recreation and Workplace mobility have been weighted negatively, whilst Grocery & Pharmacy mobility has been given a positive weighting. This reflects the fact that consumers have been able to visit the latter offer, and their presence has created footfall for locations, whilst visits by consumers to the former categories have declined hugely.



Retail Centre	Google Mobility - Retail & Recreation Average %
Harrow Road	-66.0
London West End	-66.0
King's Cross	-62.3
Swiss Cottage	-62.3
Finsbury Park	-55.7

Retail Centre	Google Mobility - Workplace Average %
Archway	-51.8
Holloway	-51.8
London West End	-51.6
Victoria Street	-51.6
Holborn – The Brunswick	-51.5

Retail Centre	Google Mobility - Grocery & Pharmacy Average %
Horncastle	45.6
Louth	45.6
Ambleside	25.1
Kendal	25.1
Penrith	25.0



Vitality Index Variables

Age and Mobility

Many citizens over the age of 66 spent the past year at home and shielding. Having a large amount of over 66s in the local population will therefore impact the vitality of a retail centre. This is because many elderly people will feel uncomfortable entering a crowded space, and instead they prefer to shop online, reducing a centre's footfall and spend.

Populations with larger proportions of residents aged 75 and over are even more likely to have been shielding and staying inside, creating a greater effect on retail centres in these areas. Those locations with a higher proportion of elderly populations tend to be outside of city centres, and aside from New Milton, tend to be in coastal locations.

Households with 2 or more cars also have been assessed, as high car ownership signifies a reduced reliance on public transport – and thus a lower contact with others - and a greater ability to independently travel to retail centres. Catchments that have high proportions of consumers with 2 or more cars will therefore perform better than others, as the consumers are better able to travel safely to the retail centre.



Retail Centre	66-75 %	75+ %
Hunstanton	17%	23%
Sidmouth	16%	21%
New Milton	15%	20%
Mablethorpe	22%	19%
Cromer	16%	18%

Retail Centre	2+ Cars
Inverurie	58%
Gerrards Cross	57%
Knowle	57%
Thame	55%
Crowborough	54%



Vitality Index Variables

Provision of Aspirational Retail

Aspirational retail attracts consumers with high propensities to spend and significant levels of wealth. This increases a retail centre's productivity level, in terms of the sales density, and usually indicates a more pleasant shopping environment.

The largest retail centres usually include an element of aspirational retail, as these types of retailers are best aligned to areas of high spend and footfall. However within the larger centres, aspirational retail may only account for a small proportion of the total retail offer. Smaller market towns and wealthy urban neighbourhoods also have a high amount of aspirational retail per total market size, which is reflected in the 2021 Vitality Rankings. These smaller retail centres might be known for being aspirational destinations, which attracts consumers from elsewhere, such as Sloane Street. Aspirational retail is also likely to be located in these smaller centres due the level of affluence in the surrounding area, meaning that the supply is matching the demand.



Retail Centre	Aspirational Retail % of Total Floorspace
Sloane Street	94%
Fulham Road	86%
Wimbledon Village	83%
Knightsbridge	78%
Cobham	75%



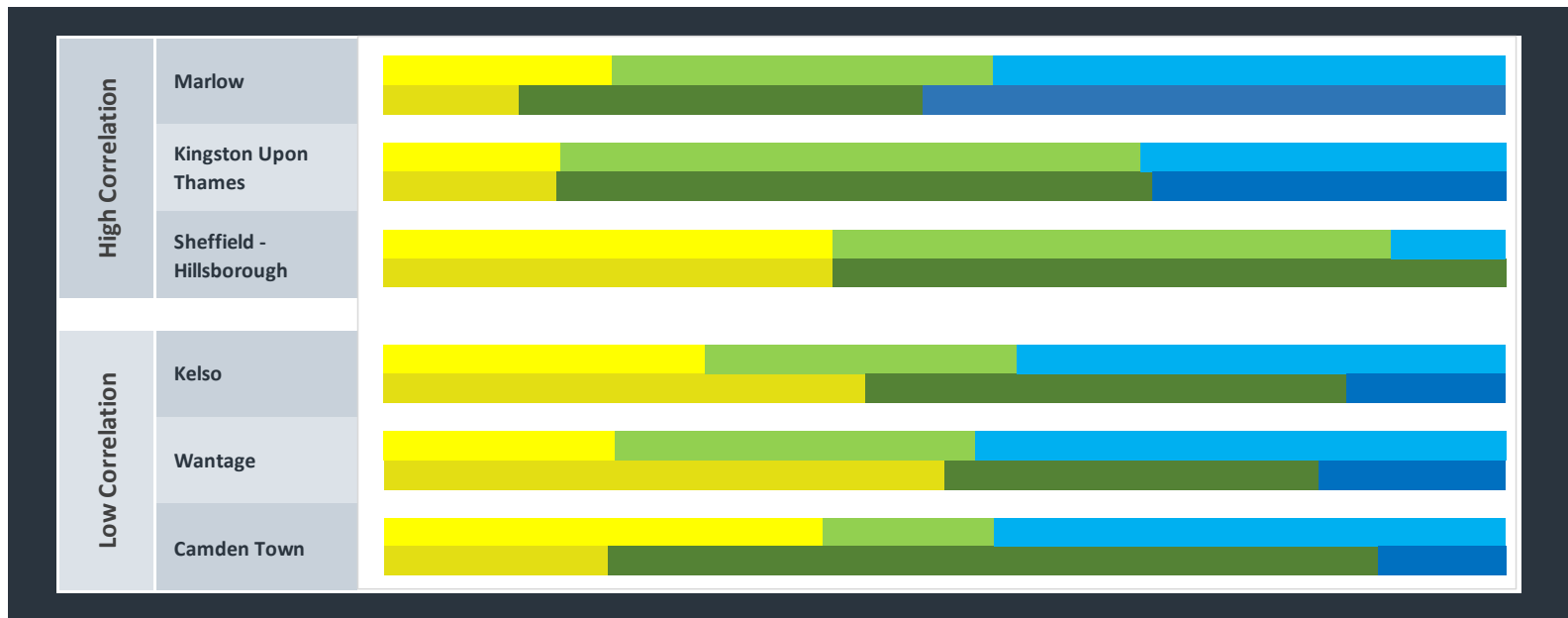
Vitality Index Variables

Suitability to Local Consumer

A centre with a high level of vitality has a retail mix that serves the needs of its local population, with a suitable combination of value, mid-market or upmarket offers. The retail supply of each retail centre has been assessed in relation to the demands of the local customer, considering the consumer's demographics.

The retail composition of each location has been quantified by assigning hundreds of major UK retailers into value, mid-market and upmarket categories. We have also calculated the proportion of the local catchment population falling into three comparable categories using our HDH Shopper Segments – the wealthiest category (groups 1, 2 and 3) is generally attracted to upmarket retail, the middling-affluence shoppers (groups 4, 5, 6 and 7) are more likely to demand mid-market stores and the least affluent groups (8, 9 and 10) shop mostly at value-led shops. We have then assessed the correlation between the retail offer and consumer demand to demonstrate the degree of fit between the two.

Below are examples of three centres with high correlations of retail offer vs shopper type, and three centres where the retail mix is less suitable to the catchment demographics.



Catchment demographics* % Least Affluent Shoppers % Mid-Affluence Shoppers % Wealthy Shoppers
 Retail composition % Value Retail % Mass Market Retail % Upmarket Retail

*For detail on HDH Shopper Groups, see following appendix,

Source: HDH



Appendix: HDH Shopper Segments



HDH Shopper Segment 1: Wealthy Urbanites

Wealthy Urbanites include singles and couples that live in exclusive urban neighbourhoods, such as fashionable city centres or expensive suburban areas. Residences are rented or mortgaged – occasionally wholly-owned – and high prices are not a barrier to occupation. Car ownership is low due to their city living.

Education levels are very high, and people are either employed in well-paid professional jobs or do not need to work due to family or accumulated wealth. They are typically career-driven, with higher levels of disposable income and have children less frequently. The number of company directors is also high – even amongst the younger members of the segment. Investment is another way that they increase their wealth.

Wealthy Urbanites are early adopters of technology and fashion trends, as they are interested in new ideas and have the money to afford being at the cutting edge. They are also happy to pay for high quality service and products, with clothing tastes being modern and on-trend, whilst branding is also important. This group is more likely to foster a global perspective due to their monetary means for international travel.

Wealthy Urbanites	
Annual Salary Per Capita	£70,000
Adult Age	20-59 yrs
Child Age	Few Children
House Price	Very High
Geographical Area	Inner City / Suburbs
Social Group	AB
Qualifications	Very High
Employment Type	Professional
Newspaper Readership	Financial / Quality
Car Ownership	Low
Internet Usage	Very High
Example Locations	Kensington, Chelsea, Knightsbridge, Notting Hill Gate

Source: HDH



Canada Goose **Reiss** **Paul Smith**

Burberry **Coach** **Whole Foods**

Harvey Nichols **Selfridges & Co**

Apple **Ralph Lauren**

Tory Burch **Ted Baker**



HDH Shopper Segment 2: Maturing Affluence

Mature couples, often with grown-up children who have moved out, are dominant in the Maturing Affluence Shopper Segment. High ranking roles in large organisations, or their own companies, provide large incomes that allow ownership of large detached properties in the countryside or the outer-suburbs. Rich retirees are also found in the Maturing Affluence category. Rural living is likely to have been motivated by a search for peace and quiet, after living in expensive city areas that are classified in the Wealthy Urbanites Segment.

Savings built up over long careers add to their high income levels, and, without the burden of mortgages, many have significant discretionary wealth. This is spent on the finer things in life, from foreign holidays and large technology products, to wine and clothing.

Whilst keen for new experiences and quality products, this demographic's tastes are often relatively conservative. Their financial investments are lower risk for the same reason. However technological literacy is high as they embrace developments that will make their life more comfortable and enjoyable.

Maturing Affluence	
Annual Salary Per Capita	£60,000
Adult Age	40+ yrs
Child Age	15+ yrs
House Price	Very High
Geographical Area	Suburbs / Rural
Social Group	AB
Qualifications	High
Employment Type	Professional
Newspaper Readership	Financial / Quality
Car Ownership	High
Internet Usage	Above Average
Example Locations	Guildford, Tunbridge Wells, Epsom, Bath, Berkhamsted

Source: HDH



L.K.Bennett

M&S

John Lewis & Partners

Fenwick

Radley

Waitrose & Partners

Joules

Barbour

Jo Malone

Crew

Hunter

Clothing Co

Hobbs

Whistles



HDH Shopper Segment 3: Prosperous Families

These families tend to have relatively young children, and have been attracted to affluent rural and suburban areas by well-performing schools and spacious houses & gardens. Household income is well above the national average, even though one parent is sometimes at home, caring for children. This segment is reaching the pinnacle of their careers in a range of capacities: senior positions in both white and blue collar firms; taking responsibility for the running of important corporate functions; and becoming key decision makers.

Whilst their careers may have a global aspect, their focus will also be local when it comes to personal considerations. They are likely to be active in their communities, from school boards to local councillors, reflecting their desire to influence their offspring's environment and have a positive impact generally.

Good quality is important to these shoppers, in terms of food, clothing and consumer products. The children will have a strong impact on their purchasing decisions, creating demand for technology, large cars and new retail trends.

Prosperous Families	
Annual Salary Per Capita	£50,000
Adult Age	30-64 yrs
Child Age	5-19 yrs
House Price	Above Average
Geographical Area	Rural
Social Group	AB
Qualifications	Above Average
Employment Type	Professional, White Collar
Newspaper Readership	Regional / Quality
Car Ownership	Very High
Internet Usage	High
Example Locations	Salisbury, Thame, Bury St Edmunds, Grantham, Harrogate

Source: HDH



Mint Velvet	Lululemon
Phase Eight	Disney Store
Oliver Bonas	Fat Face
JoJo Maman Bébé	Sweaty Betty

M&S
L'Occitane



HDH Shopper Segment 4: Settled in Suburbia

Consumers classified as Settled in Suburbia tend to live in medium-sized to large detached or semi-detached homes in pleasant suburban neighbourhoods. House prices are not especially high as these suburbs are in towns across the UK, rather than London or a major city. Owner-occupation is common due to the affordability of the housing relative to the reasonable incomes. Car ownership is high due to weak public transport links.

People will have settled in the area, with no immediate plans to move, creating strong community ties. Professional and white collar occupations dominate, with blue collar roles also present and consumers are often working in the same town in which they live. This group is likely to be more conservative and strong proponents of local impacts.

Reliable, conventional retail brands are popular, with few people straying to either end of the market. Affordability is important but these consumers will pay more to ensure higher quality.

Settled in Suburbia	
Annual Salary Per Capita	£42,000
Adult Age	30-74 yrs
Child Age	0-15 yrs
House Price	Average
Geographical Area	Towns / Suburbs
Social Group	ABC1
Qualifications	Above Average
Employment Type	White & Blue Collar
Newspaper Readership	Regional / Mid Market
Car Ownership	High
Internet Usage	High
Example Locations	Ruislip, Clacton-on-Sea, Maidstone, Potters Bar

Source: HDH



Charles Tyrwhitt		Timberland
White Stuff	M&S	Superdry
Trespass		Waterstones
Robert Dyas	GAP	Lakeland
Holland & Barrett		Sainsbury's



HDH Shopper Segment 5: Mixed Neighbourhoods

The consumers in the Mixed Neighbourhoods Shopper Segment are united by a comfortable level of affluence. They tend to be relatively securely employed, in mid-range white collar and blue collar jobs, and levels of wealth are just above the average allowing people to live in relative ease.

Diversity is common in these areas. Their lifestage can include younger couples, couples with young children, people living alone and older couples. The neighbourhoods can be found in suburban, rural or coastal areas, and are found in greater numbers at the extremes of the country - further away from London and the South East.

Education levels are lower than the more affluent segments, and whilst they maintain steady jobs in local businesses, family is the driving force in their lives. In the same way, these consumers are not as interested in new trends in fashion or technology. Comfortable and well-made clothing is the priority, rather than the willingness to pay for expensive brands. This group is known for their strong community ties.

Mixed Neighbourhoods	
Annual Salary Per Capita	£34,000
Adult Age	30-74 yrs
Child Age	5-15 yrs
House Price	Below Average
Geographical Area	Towns / Suburbs
Social Group	BC1C2
Qualifications	Average
Employment Type	White & Blue Collar
Newspaper Readership	Regional / Mid Market
Car Ownership	Average
Internet Usage	Average
Example Locations	Glasgow, Plymouth, Birmingham, Leicester

Source: HDH



HDH Shopper Segment 6: Average Families

These consumers are generally families with children of varying ages, although some live on their own. They can be found in less affluent suburban areas, often in functional semi-detached or terraced properties, located in the suburbs of cities, towns and coastal areas. As they reflect an average British household, people classified as this Shopper Segment can be found in regions across the UK.

Affluence levels are moderate, and allow people enough money to meet essential needs, such as utility bills and groceries, as well as make reasonably regular discretionary purchases. High spending is not common, however.

Firmly mid-market brands are popular with these shoppers. Function and value are desired equally, with people happy as long as their needs are met. Educational attainment is slightly lower than some but incomes achieved are average, as are indicators such as internet usage, car usage and credit risk. Mainstays for this group are typically family-focused, and motivated on the support and needs of the household which drives their purchasing preferences.

Average Families	
Annual Salary Per Capita	£26,000
Adult Age	30-64 yrs
Child Age	5-19 yrs
House Price	Below Average
Geographical Area	Towns / Suburbs
Social Group	C1C2D
Qualifications	Below Average
Employment Type	White & Blue Collar
Newspaper Readership	Mid Market
Car Ownership	Average
Internet Usage	Average
Example Locations	Coventry, Swansea, Torquay, Swindon, Hastings

Source: HDH



Boots	Next	GAP Kids
Morrisons	Primark	Clarks
New Look	Asda	H&M
Claire's		Deichmann



HDH Shopper Segment 7: Students and Graduates

With a young age profile, these people tend to be students or recent graduates. They largely live in inner-city areas, near universities or in districts of cheaper housing. Singles dominate in what are usually privately-rented or university-provided flats or small, terraced houses. Population densities are generally quite high although some nicer suburbs are included. The presence of these youthful consumers can lead to gentrification as independent but stylish retailers and restaurants locate nearby to provide a convenient quality offer.

Levels of affluence are relatively low: students are usually not in employment, and the recent graduates are just starting out in their career - often with a large debt to pay. There is pressure to spend beyond their means in order to wear the latest fashions, and funds are easier to access from parents or bank loans. As a consequence, relatively expensive retailers are popular in combination with better value options. These consumers are at the forefront of trends through a high level of interest and engagement, even if the products are not always affordable. They will both follow the new trends as well as creating them, finding inspiration from home and abroad due to very high levels of internet usage.

Students and Graduates	
Annual Salary Per Capita	£22,000
Adult Age	20-44 yrs
Child Age	0-19 yrs
House Price	Low
Geographical Area	Inner City / Suburbs
Social Group	BC1
Qualifications	Above Average
Employment Type	Professional, White Collar
Newspaper Readership	Quality / Mid Market
Car Ownership	Below Average
Internet Usage	Very High
Example Locations	Bristol: Clifton, Leeds: Headingley, Oxford: Headington

Source: HDH



& Other Stories

Zara

Accessorize

Lush

T.K.Maxx

Urban Outfitters

Weekday

Topshop

asos

boohoo



HDH Shopper Segment 8: Struggling Workers

This Shopper Segment is found in poorer city suburbs and towns. Their homes are smaller terraced or semi-detached units, often ex-council houses, and are predominantly mortgaged or rented. Car ownership is low as the extra cost can not be afforded and credit is hard to find, and consequently they are reliant on public transportation.

Due to weaker qualifications than found on average across the UK, Struggling Workers are restricted to low-paying white and blue collar jobs. Rising above this level is difficult given the competition for jobs from better trained citizens and new employees entering the workforce each year. Levels of disposable income are low, as earnings tend to be swallowed up by essentials, such as groceries and household bills. Value retail is the focus for these consumers, making their income go as far as possible. Function dominates their purchases with little consideration of new trends. Branded sportswear is popular, but is used for both sports and home wear. Internet shopping allows bargain hunting for this group.

Struggling Workers	
Annual Salary Per Capita	£18,000
Adult Age	35-59 yrs
Child Age	0-15 yrs
House Price	Low
Geographical Area	Small Towns / Suburbs
Social Group	C1C2D
Qualifications	Below Average
Employment Type	White & Blue Collar
Newspaper Readership	Regional / Popular
Car Ownership	Low
Internet Usage	Average
Example Locations	Tottenham, Leyton, Burnley, Stratford, Mansfield, Corby

Source: HDH



Matalan

Sports Direct.com

JD

T.K.Maxx

Greggs

Lidl

b&m

Iceland

Dorothy Perkins

Primark



HDH Shopper Segment 9: Poorer Families

These families live in poor quality housing in some of the least-expensive parts of cities and their suburbs, as well as small towns. Economically-challenged parts of northern England and Scotland are their most likely location. Socially rented properties are common and home ownership is often out of reach – council and housing association tenants dominate.

Qualification levels are low and employment tends to be relatively menial and low-paid. With larger families generally requiring one parent/guardian to stay home, there are many single-income families. In turn, car ownership is also low, meaning that this consumer group does not travel far from their homes – trips to large retail centres are rare and shopping is a local, day-by-day pursuit.

Value is the dominating motivation when buying groceries and consumer products to enable their money to go as far as possible, especially with larger families. Multi-line retailers are popular because they meet the needs of the whole family, while not requiring much in the way of disposable income, and often allow cost-comparison within the same store.

Poorer Families	
Annual Salary Per Capita	£12,000
Adult Age	20-59 yrs
Child Age	0-19 yrs
House Price	Low
Geographical Area	Small Towns / Suburbs
Social Group	C1C2D
Qualifications	Low
Employment Type	Blue Collar / Unskilled
Newspaper Readership	Popular
Car Ownership	Low
Internet Usage	Low
Example Locations	Colne, Bradford, Luton, Blackburn, Braehead

Source: HDH



Home Bargains **Sports Direct.com**

Wilko

Aldi

Pep&Co

Bonmarché

Primark

Card Factory

Londis

Budgens

Burton



HDH Shopper Segment 10: Borderline Poverty

This demographic is often receiving some form of government support, challenged to meet bill payments and pay for essentials such as food. Qualification levels are very low and, largely as a result, unemployment rates are significant. Employment for this demographic is generally insecure and low-wage. Single parents are more common in this Shopper Segment, which compounds their poverty and reliance on the state.

The majority of people will be claiming some form of means-tested benefit, and socially rented housing is very common. Pawnbrokers and loan companies are also widespread in these areas and used to deal with cash flow problems. Credit worthiness will be low however, resulting in unfavourable offers.

Value-led occupiers are the only retail option for these consumers, and charity shops help them stretch their money further. The day-to-day focus of this group may be narrowed and driven mainly by meeting their most pressing needs.

Borderline Poverty	
Annual Salary Per Capita	£9,500
Adult Age	20-59 yrs
Child Age	0-19 yrs
House Price	Very Low
Geographical Area	Small Towns / Suburbs
Social Group	C2DE
Qualifications	Very Low
Employment Type	Blue Collar / Unskilled
Newspaper Readership	Popular
Car Ownership	Very Low
Internet Usage	Low
Example Locations	Jarrow, Sheffield, East Kilbride, Rhyl, Toxteth

Source: HDH



Poundland	Bargain Booze
The Money Shop	McDonalds
Costcutter	Oxfam
Ladbrokes	Farmfoods



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