BRC

Sensormatic Solutions

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

September 2022

Period covered:
28 August – 01 October 2022

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"Footfall reached its highest level since the onset of the pandemic, coming within 10% of its pre-pandemic levels. High Streets and Retail Parks saw an improvement in shopper numbers, while Shopping Centres continued to lag significantly behind, still more than a fifth down from three years ago. Shopping Centres continue to see higher vacancy rates than other locations, with many not have recovered from the loss of key anchor stores such as Debenhams, which went into liquidation during the pandemic.

"These figures belie the collapse in consumer confidence which has resulted in falling sales volumes throughout the year. Meanwhile, soaring cost inflation is leading to upwards pressure on prices. The recent mini budget failed to provide retailers with clarity on the future of business rates, already a massive cost. Without action, retailers could face a 10% rise in their rates bill – equal to an additional £800m across the industry. While the energy support for businesses has been warmly welcomed by companies, a freeze to business rates, with the promise of further reform, would go a long way to restoring business confidence and supporting future investment, as well as offering retailers a means to cut prices for their customers."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"While total UK retail saw footfall recovery rise to its highest point this year compared to pre-pandemic levels in September, boosted in part by Back-To-School trading at the beginning of the month, retailers won't be looking at High Street performance through rose-tinted glasses. With all eyes turning towards the Golden Quarter, perhaps with a starker air of caution given the financial turbulence seen over the last few weeks and higher energy bills starting to hit consumers from October, many are already downgrading Christmas trading forecasts amid shaky consumer confidence. And this means that amongst the usual pressures of preparing for peak, retailers will need to think hard about how they can support – and deliver value to - an increasingly cautious cost-of-living shopper during what will be a critical trading period."

Executive Summary

September moved closer towards pre-pandemic levels compared to all other previous months since February 2020. In addition, compared to September 2021, we see an improvement of 8.0%. Although better than the year-on-year progress seen in August, it is lower than the year-on-year improvements seen in the prior months of 2022.

Total Retail Footfall Index

Total UK footfall decreased by 9.8% in September (Yo3Y), a 2.6 percentage point improvement from August. This is better than the 3-month average decline of 11.4%.

-9.8%
% change vs 2019
[+8.0% compared to September 2021]

BY SHOPPING LOCATION:

High Street Footfall

Footfall on High Streets declined by 11.9% in September (Yo3Y), 1.7 percentage points better than last month's rate and an improvement on the 3-month average decline of 13.0%.

-11.9%
% change vs 2019
[+12.9% compared to September 2021]

Retail Park Footfall

Retail Parks saw footfall decrease by 2.5% (Yo3Y), 1.6 percentage points better than last month's rate and an improvement on the 3-month average decline of 9.3%.

-2.5%
% change vs 2019
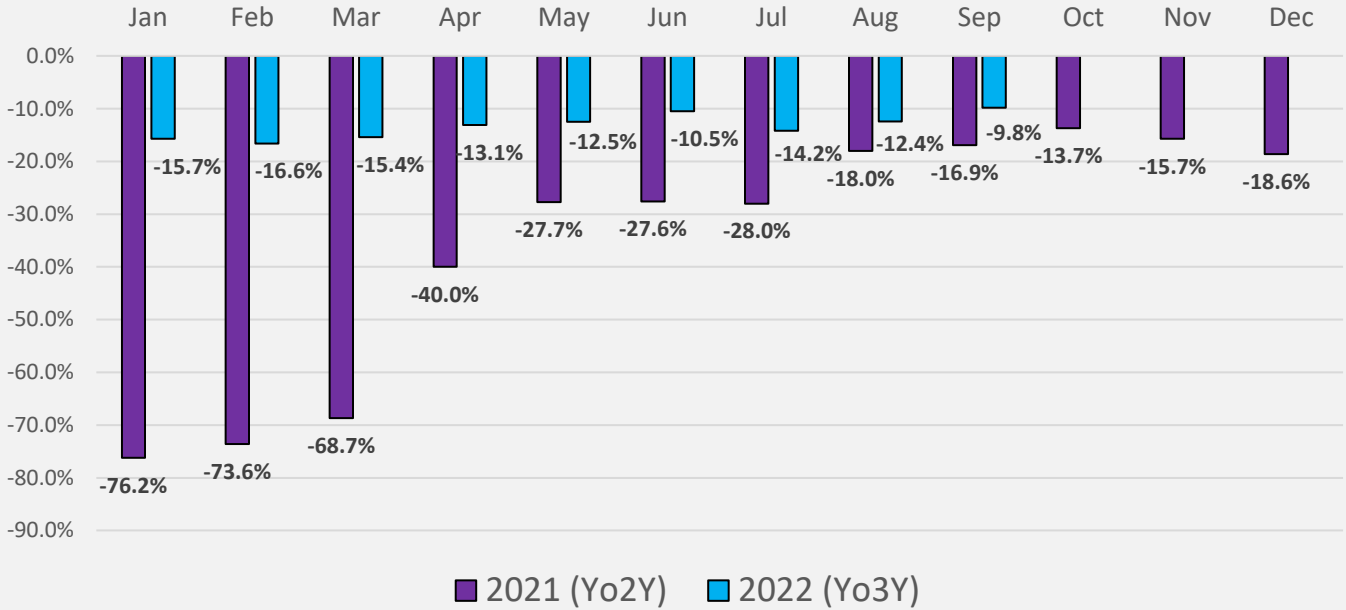[+0.4% compared to September 2021]

Shopping Centre Footfall

Shopping Centre footfall declined by 22.7% (Yo3Y), the same as last month's rate and above the 3-month average decline of 23.0%.

-22.7%
% change vs 2019
[+17.3% compared to September 2021]

TOTAL UK FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021 (Yo2Y)	-76.2%	-73.6%	-68.7%	-40.0%	-27.7%	-27.6%	-28.0%	-18.0%	-16.9%	-13.7%	-15.7%	-18.6%
2022 (Yo3Y)	-15.7%	-16.6%	-15.4%	-13.1%	-12.5%	-10.5%	-14.2%	-12.4%	-9.8%			

■ 2021 (Yo2Y)   ■ 2022 (Yo3Y)

Footfall making strides

UK Footfall took another step in the right direction in September, boosted in part by Back-To-School trading at the beginning of the month. This marks the highest recovery point since the onset of the pandemic.

September's performance improved, seeing a 2.6 percentage point rise relative to the previous month, but remaining below the normal pre-pandemic levels.

September

-9.8%

Year-on-Three-Year

[+8.0% compared to 2021]

12-month average
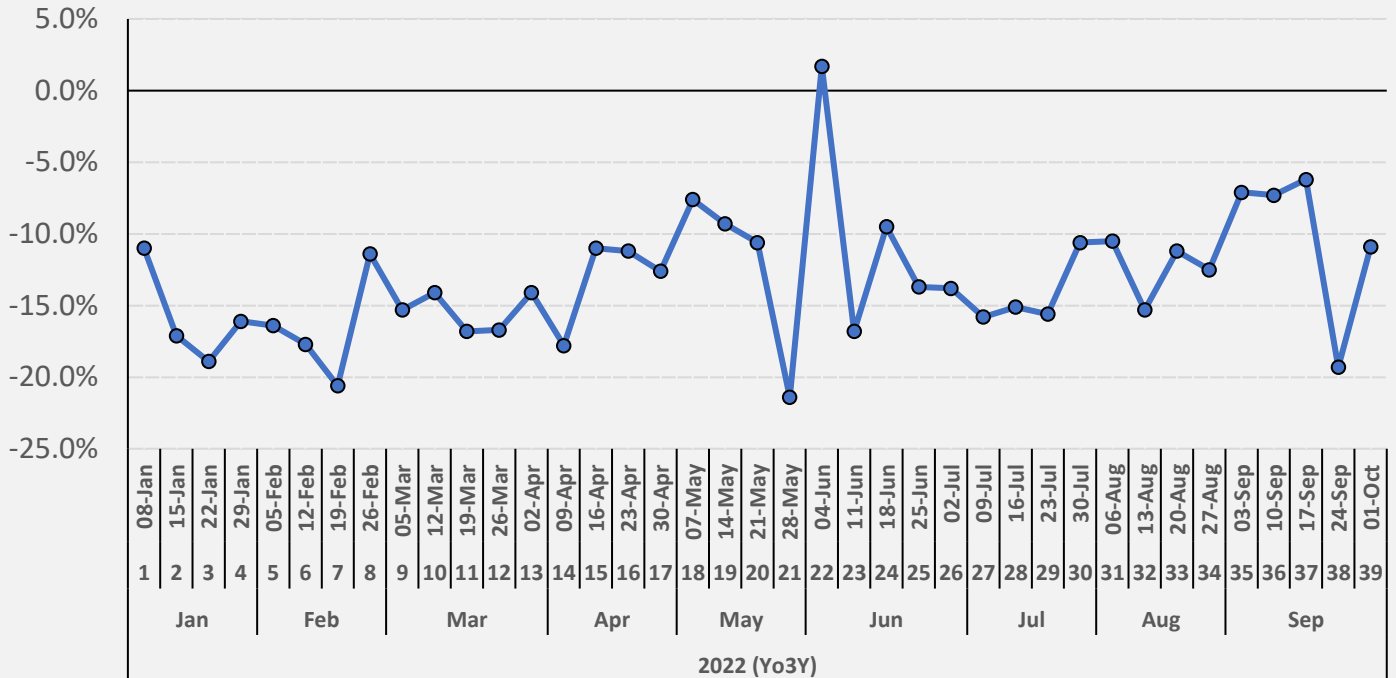
-13.5%

Year-on-Three-Year

[+50.8% compared to 2021]

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WEEKLY TOTAL RETAIL FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS, Yo3Y)

SEPTEMBER UK WEEKLY FOOTFALL

Footfall in September remained above -20% throughout the month when compared to the same weeks in 2019, with week three above -7%. The 19.3% sharp decline seen in week four would have been due to the Queen's funeral, with many shops closing as a mark of respect.

Compared to pre-pandemic levels, the shallowest decline was seen in the third week, wk 37 (-6.2%), whilst the steepest decline was in the fourth week, wk 38 (-19.3%).

Although September footfall levels were impacted by the passing of the Queen and subsequent shop closures, footfall levels remained broadly stable in the weeks preceding this, with the third week in the top three weekly performances of 2022 thus far.

Week 37 (11 Sep – 17 Sep)

-6.2%

Year-on-Three-Year
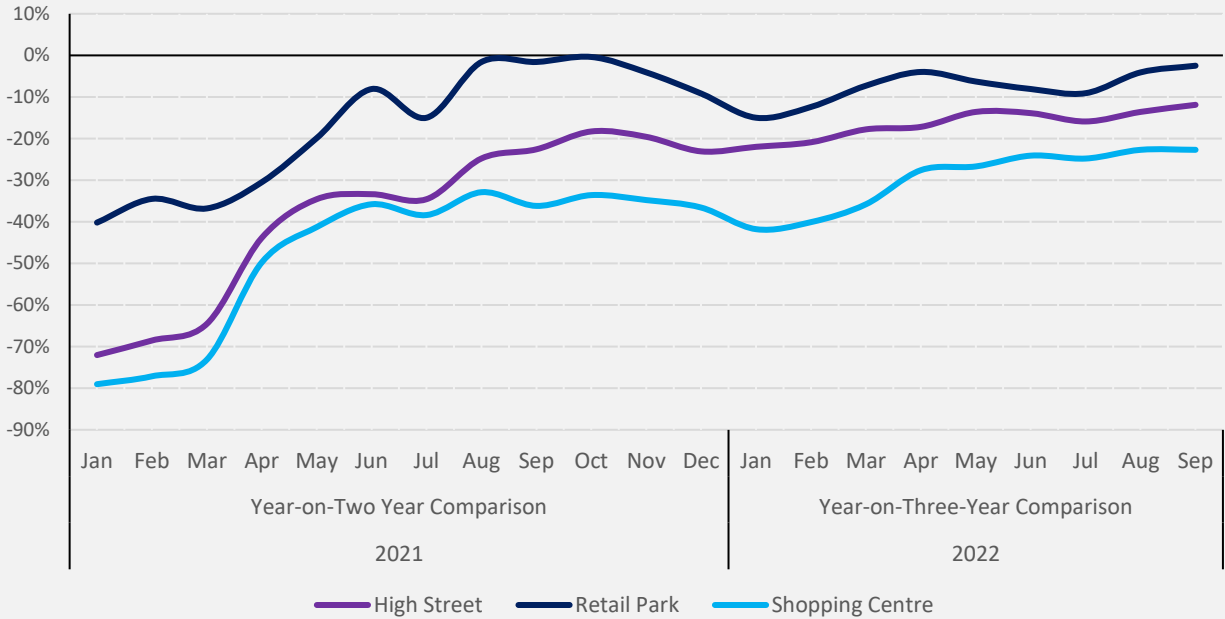[+9.8% compared to 3rd wk of Sep 2021]

Week 38 (18 Sep – 24 Sep)

-19.3%

Year-on-Three-Year
[+0.1% compared to 4th week of Sep 2021]

FOOTFALL BY LOCATION (% CHANGE ON PRE-PANDEMIC LEVELS)

Retail Park recovery remains ahead of other locations

Across all retail locations, footfall improved year on year, with Retail Parks showing the best performance, followed by the High Street, as Shopping Centres lagged behind. This pattern has been observed since Jan 2021.

Comparison to 2019

All retail footfall was down 9.8% on average.

Retail Parks saw a decline of 2.5%. This compares to the 3 month and 6 month averages of -9.3% and -5.7%, respectively.

High Streets saw a decline of 11.9%. This compares to the 3 month and 6 month averages of -13.0% and -14.4%, respectively.

Shopping Centres again saw a decline of 22.7%. This compares to the 3 month and 6 month averages of -23.0% and -24.8%, respectively.

Retail Parks

-2.5%
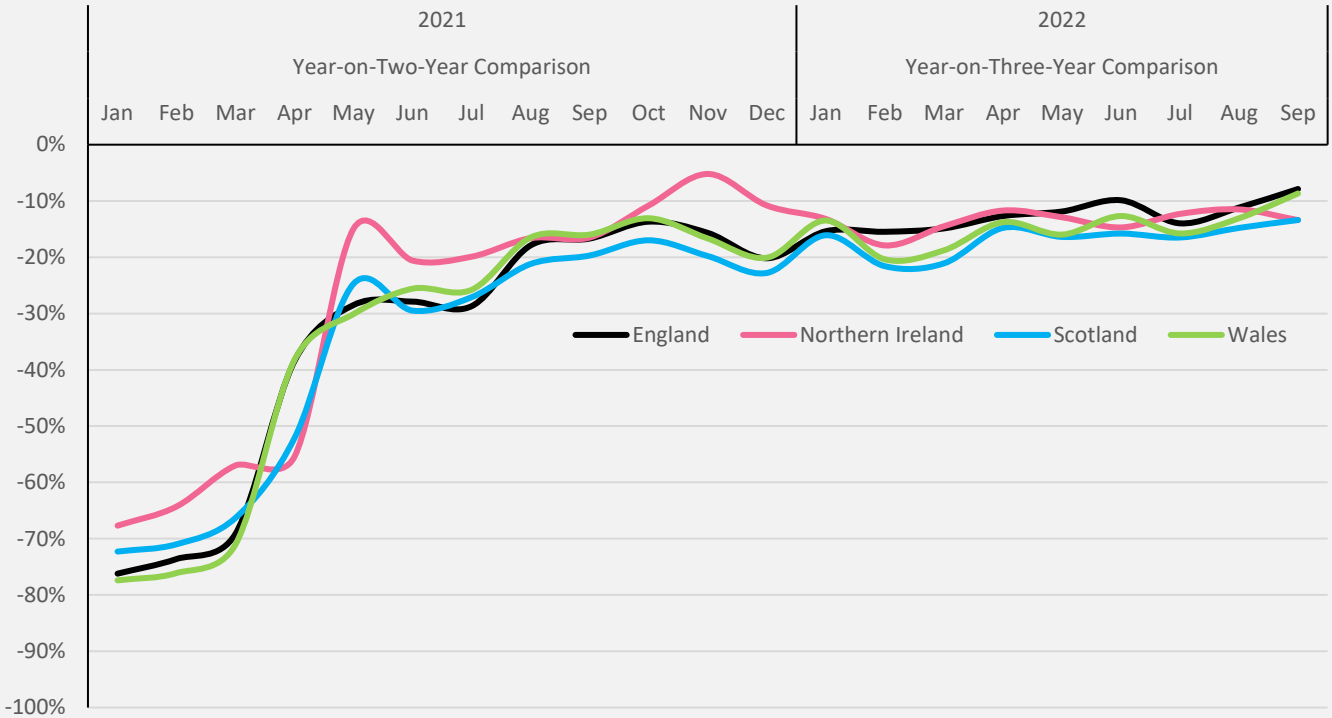Year-on-Three-Year

[**+0.4%** compared to September 2021]

Shopping Centres

-22.7%
Year-on-Three-Year

[**+17.3%** compared to September 2021]

NATIONAL FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS)

UK Nations

England again saw the strongest recovery of all the UK's nations, with a decline of 7.9% vs pre-pandemic, but is up 8.4% vs 2021.
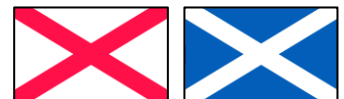
Wales saw a decline of 8.7% vs pre-pandemic, but is up 7.9% vs 2021.

Northern Ireland saw a footfall decline of 13.4% vs pre-pandemic, but is up by 2.7% vs. 2021.

Scotland also saw a footfall decline of 13.4% and lagged behind the rest of the UK for the fourteenth consecutive period. However, it was up 6.9% vs. 2021.

vs. 2019

-7.9%

-8.7%

-13.4%

UK FOOTFALL BY ENGLISH REGION
BRC - Sensormatic IQ Footfall Monitor

TOTAL FOOTFALL BY REGION (% CHANGE Yo3Y)

GROWTH RANK	REGION	% GROWTH Yo3Y
1	North West England	-4.7%
2	West Midlands	-5.2%
3	South West England	-5.5%
4	Yorkshire and the Humber	-5.5%
5	East of England	-6.6%
6	South East England	-7.5%
7	North East England	-8.2%
8	East Midlands	-8.3%
9	London	-12.5%

ENGLISH REGIONAL BREAKDOWN

North West England saw the strongest recovery in footfall of all the regions of England in September, topping the table 13 times in the last 14 months.

North West England saw a decline of 4.7% compared to 2019 but was up 4.7% year-on-year. However, the largest increase compared to last month was seen in the East of England.

London saw the worst footfall recovery of all the regions of the UK, with a decline of 12.5% vs. 2019, but up 16.0% year-on-year.

Best Performing Region(s)

-4.7%

North West England (Yo3Y)
[+4.5% compared to September 2021]

Worst Performing Region

-12.5%

London (Yo3Y)
[+16.0% compared to September 2021]

UK FOOTFALL BY CITY
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TOTAL FOOTFALL BY CITY (% CHANGE Yo3Y)

GROWTH RANK	CITY	% GROWTH Yo3Y
1	Manchester	-2.0%
2	Nottingham	-7.8%
3	Liverpool	-8.8%
4	Leeds	-8.9%
5	Edinburgh	-10.2%
6	Glasgow	-10.4%
7	Birmingham	-11.5%
8	Bristol	-12.1%
9	London	-12.9%
10	Cardiff	-13.6%
11	Belfast	-18.7%

CITY TRACKER

All major UK cities reflected the national picture with footfall down 10.6% vs 2019, although with significant variation, and all cities showed an improvement of 6.9% on average vs 2021.

For the sixth consecutive month, the best performing city was Manchester, with a decline of 2.0% compared to 2019 but an improvement of 4.0% compared to last month.

For the first time since April 2021, the worst performing city was Belfast, with a decline of 18.7% compared to 2019 and a fall of 5.6% compared to last month.

Best Performing City

-2.0%

Manchester (Yo3Y)

[+11.4% compared to September 2021]

Worst Performing City

-18.7%

Belfast (Yo3Y)

[+3.7% compared to September 2021]

THE BRC & SENSORMATIC SOLUTIONS

Sensormatic Solutions understands the need for the public to monitor broader retail traffic trends during the current Coronavirus pandemic. To help in this task, we are providing this weekly reporting that brings together the latest counts of confirmed virus cases with traffic trends for the corresponding time periods. Weekly COVID-19 Report

Together with the BRC, Sensormatic Solutions has worked to develop the most representative indicator of UK store performance available. The monitor aims to improve the way the BRC measures footfall by aggregating entries to stores across thousands of UK locations.

Unlike other measures of footfall which only count visits to retail areas, the BRC-Sensormatic IQ Footfall Monitor will track entries into the stores themselves. The BRC and Sensormatic Solutions have worked closely with our membership to develop the new measure, to ensure the Monitor provides a true representation of retail footfall, meaning retailers can benefit from greater insights generated from it.

Sensormatic Solutions, the leading global retail technology portfolio from Johnson Controls, is the UK's market leader in in-store footfall measurement. Its index delivers insights based on input from more than 1.5 million data collection devices in the retail marketplace and 40 billion shopper visits captured by the Sensormatic IQ brand each year.

MEDIA ENQUIRIES

Sensormatic Solutions Press Office
Katarzyna Breczko
Marketing Director EMEA Retail
T: +49 173 7070 562
katarzyna.breczko@jci.com

BRC Press Office
Tom Holder
T: +44 (0)20 7854 8924
M: +44 (0)7772 382 432
tom.holder@brc.org.uk / media@brc.org.uk

AUTHOR
ASIM DEY
Insight Executive

EDITOR
DR KRIS HAMER
Director of Insight

For enquiries, please email: insight@brc.org.uk