



**Sensormatic  
Solutions**

Comprehensive measure of  
store customer traffic

Benchmark by UK nations,  
location type and major cities

# **BRC-SENSORMATIC IQ FOOTFALL MONITOR**

**August 2022**

Period covered:  
31 July – 27 August 2022

# Headline commentary



**Helen Dickinson OBE | Chief Executive | British Retail Consortium**

“Whilst footfall in August continued its modest recovery towards pre-pandemic levels, the rate of improvement slowed. Many people remain concerned about the rising cost-of-living and the price of their energy bills, which has kept them away from visiting high streets and town centres.

“With consumer confidence at historic lows, stores continue to focus on converting customer footfall into retail sales. Big events in Birmingham and Edinburgh saw more notable advancements to footfall, as the Commonwealth Games and the Edinburgh Fringe brought more shoppers in.

“September brings a new Prime Minister and new government with a difficult task ahead. To help retailers keep prices as low as possible, the government should include a freeze in the business rates multiplier next year on the to do list, otherwise the 10 percent inflationary increase in rates bills will lead to higher prices for customers.”



**Sensormatic  
Solutions**

**Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions**

“Despite the heatwave and the ongoing train strikes cooling shopper numbers for periods during the month, August footfall on the whole remained resilient with performance improving against pre-pandemic levels compared to July, boosted in part by August staycations and rising tourist numbers returning. However, whilst the outlook for August remained cheery, retailers will be looking ahead to the Autumn – and retail’s Golden Quarter of Christmas trading - with an air of caution as the cost-of-living crisis continues to play out, and they await to see what packages of support will be offered to consumers to ease the burden on household budgets once the new PM is announced next week.”

Note: The pandemic disrupted footfall patterns with the opening and closure of shops. To date, we have reported footfall figures in comparison to pre-pandemic (2019) levels – referring to this as “Year-on-Three-Year” (Yo3Y).

As footfall now has a relatively stable, albeit lower than pre-pandemic levels, for the purpose of using recent performance benchmarks, we are reintroducing year-on-year comparisons.

## Executive Summary

August showed a moderate improvement against pre-pandemic levels compared to July with the second shallowest decline since March 2020 (first lockdown). However, although we see an improvement of 6.8% when compared to last year (YoY), this is a decline compared to the preceding 3 month YoY comparisons.

### Total Retail Footfall Index

Total UK footfall decreased by 12.4% in August (Yo3Y), a 1.8 percentage point improvement from July. This is worse than the 3-month average decline of 12.3%.

# -12.4%

% change vs 2019

[+6.8% compared to August 2021]

### BY SHOPPING LOCATION:

#### High Street Footfall

Footfall on High Streets declined by 13.6% in August (Yo3Y), 2.3 percentage points better than last month's rate and an improvement on the 3-month average decline of 14.5%.

# -13.6%

% change vs 2019

[+14.3% compared to August 2021]

#### Retail Park Footfall

Retail Parks saw footfall decrease by 4.1% (Yo3Y), 5.0 percentage points better than last month's rate and an improvement on the 3-month average decline of 8.6%.

# -4.1%

% change vs 2019

[-3.7% compared to August 2021]

#### Shopping Centre Footfall

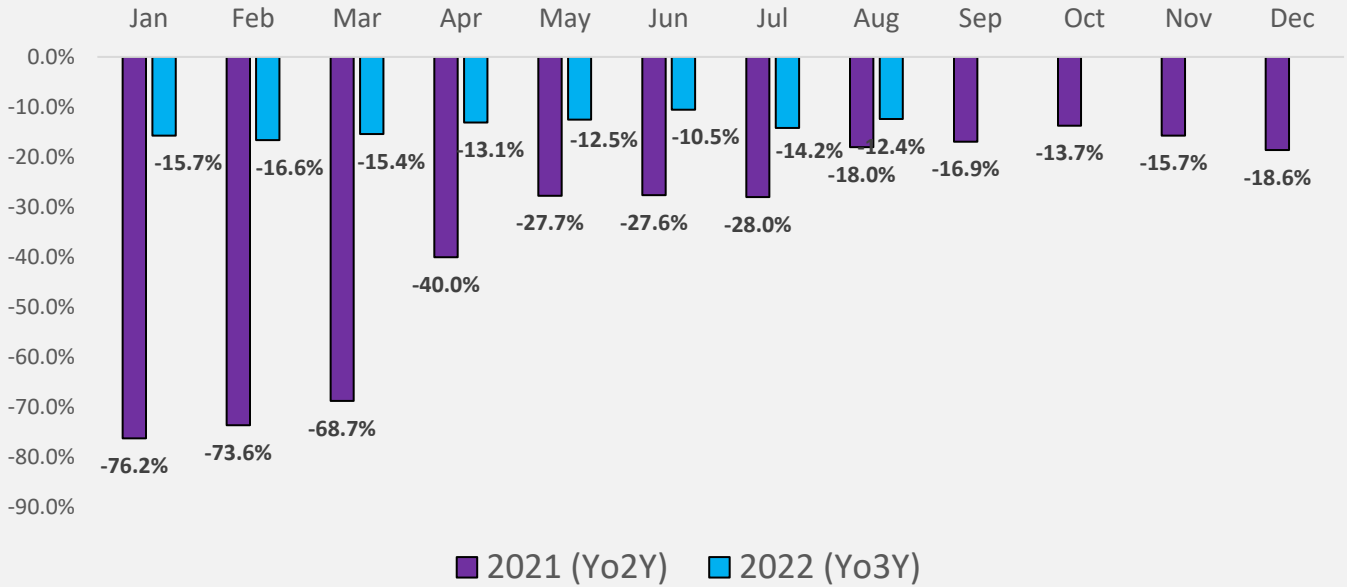
Shopping Centre footfall declined by 22.7% (Yo3Y), 2.1 percentage points better than last month's rate and above the 3-month average decline of 23.6%.

# -22.7%

% change vs 2019

[+10.2% compared to August 2021]

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



## Footfall recovery slows in August

UK Footfall took a step in the right direction in August following increased tourist numbers and staycations. This marks the second highest recovery point since March 2020.

August's performance improved, seeing a 1.8 percentage point rise relative to the previous month, but remaining below the normal pre-pandemic levels.

## August

# -12.4%

Year-on-Three-Year

[+6.8% compared to 2021]

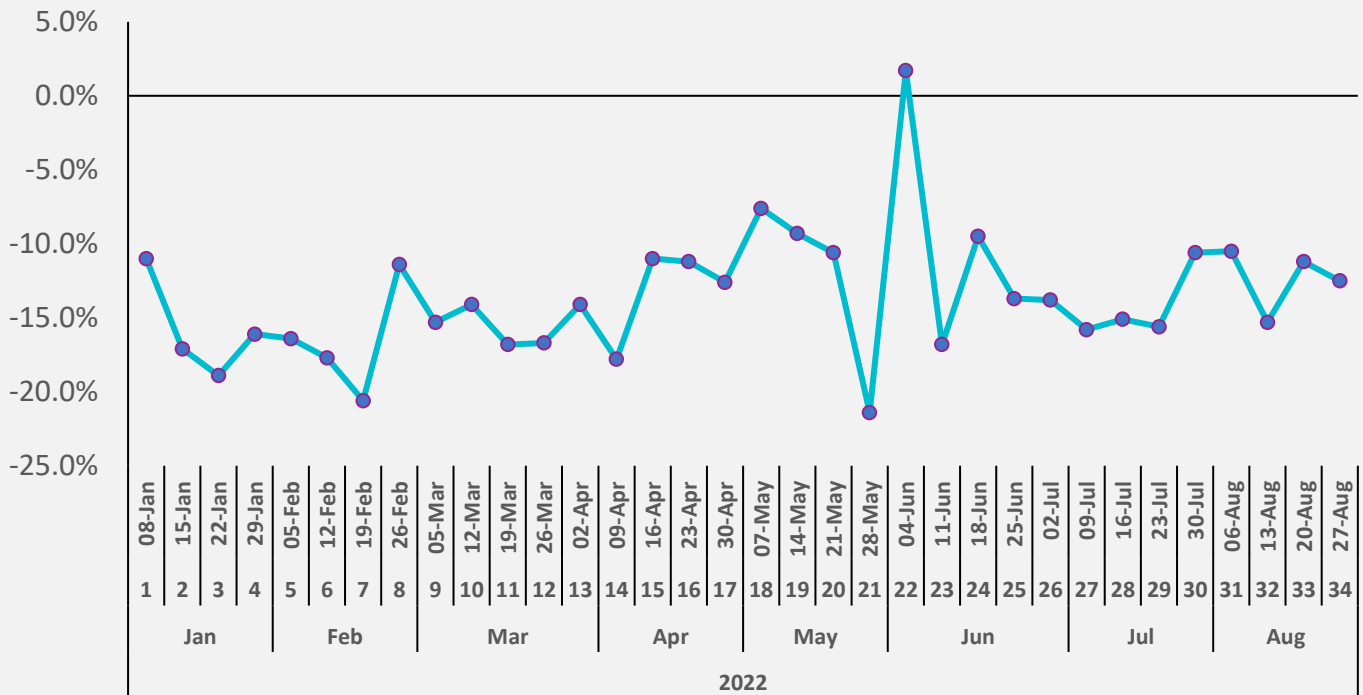
## 12-month average

# -14.6%

Year-on-Three-Year

[+51.6% compared to 2021]

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



## AUGUST UK WEEKLY FOOTFALL

Footfall in August again remained above -16% throughout the month when compared to the same weeks in 2019, with week one above -11%.

Compared to pre-pandemic levels, the shallowest decline was seen in the first week, wk 31 (-10.5%), whilst the steepest decline was in the second week, wk 32 (-15.3%).

For August, despite the dip in the second week, footfall levels remained broadly stable over the month. with the first week in the top five weekly performances of 2022 thus far.

Week 31 (31 Jul – 06 Aug)

**-10.5%**

Year-on-Three-Year

[+11.0% compared to July 2021 Week 31]

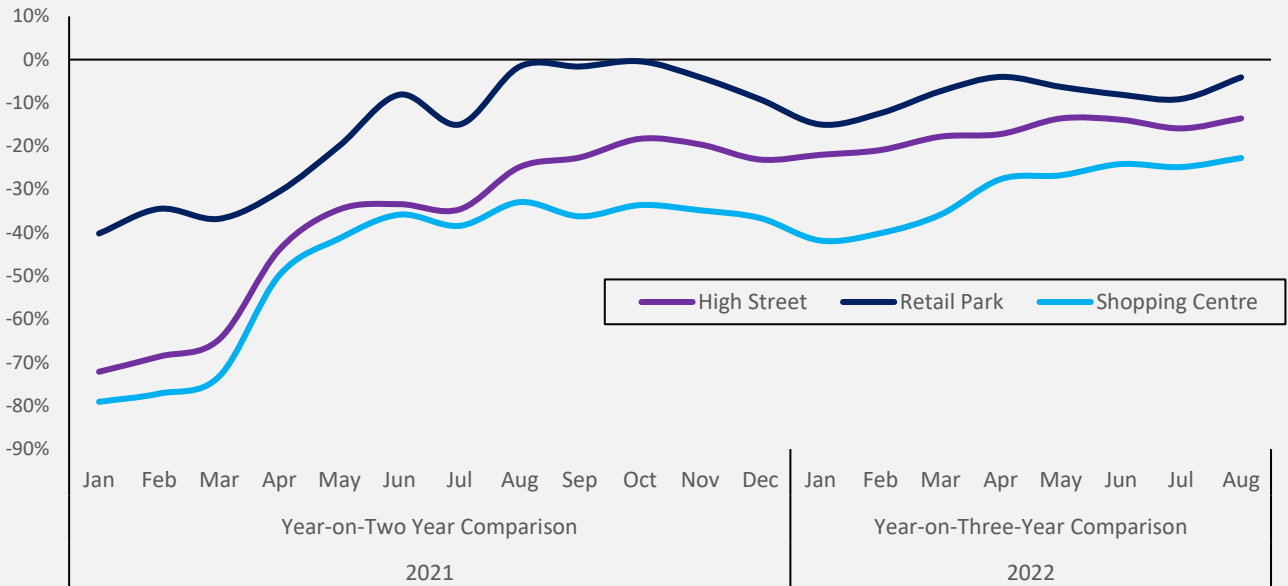
Week 32 (07 Aug – 13 Aug)

**-15.3%**

Year-on-Three-Year

[+4.3% compared to July 2021 Week 32]

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



## Retail Parks continue to remain 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 12.4% on average.

**Retail Parks** saw a decline of 4.1%. This compares to the 3 month and 6 month averages of -8.6% and -6.5%, respectively.

**High Streets** saw a decline of 13.6%. This compares to the 3 month and 6 month averages of -14.5% and -15.3%, respectively.

**Shopping Centres** saw a decline of 22.7%. This compares to the 3 month and 6 month averages of -23.6% and -27.0%, respectively.

## Retail Parks

# -4.1%

Year-on-Three-Year

[**-3.7%** compared to August 2021]

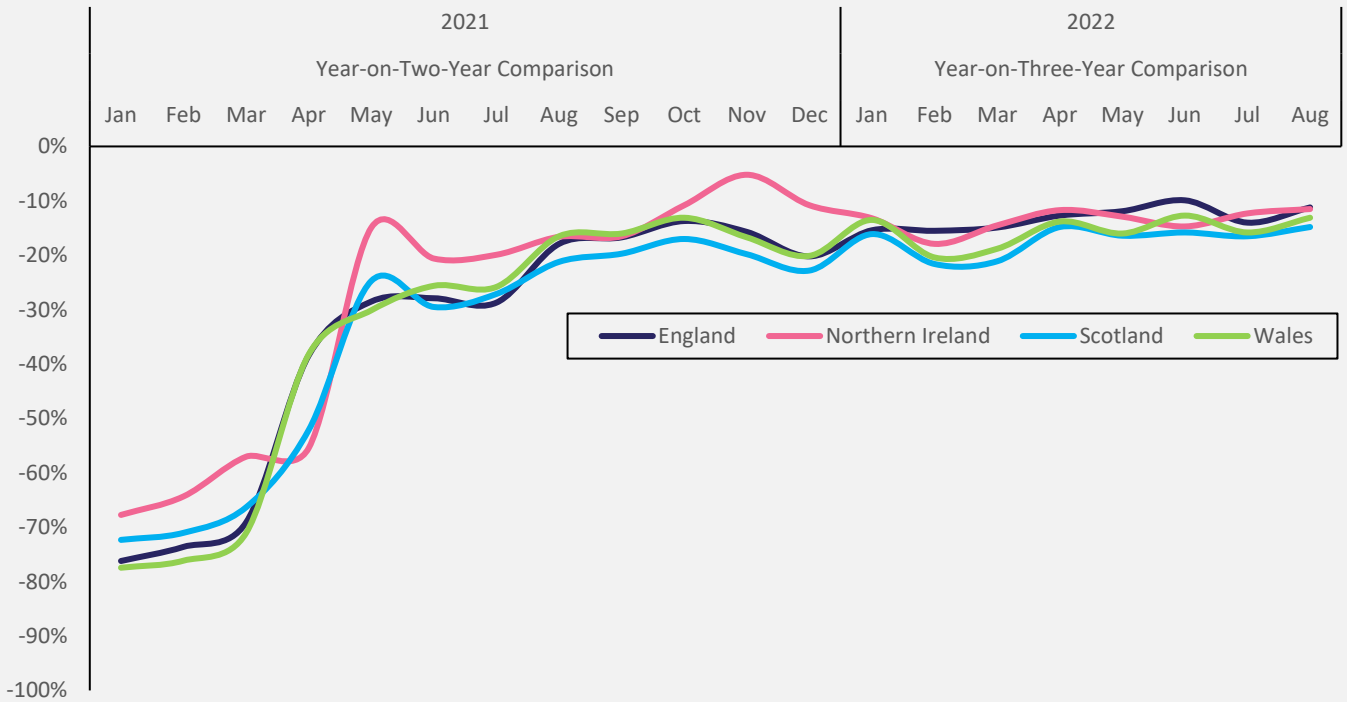
## Shopping Centres

# -22.7%

Year-on-Three-Year

[**+10.2%** compared to July 2021]

## NATIONAL FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS)



## UK Nations

vs. 2019

**England** saw the strongest recovery of all the UK's nations, with a decline of 11.2% vs pre-pandemic, but is up 7.2% vs 2021.

-11.2%



**Northern Ireland** saw a decline of 11.5% vs pre-pandemic, but is up 2.0% vs 2021.

-11.5%



**Wales** saw a footfall decline of 13.1% vs pre-pandemic, but is up 4.1% vs 2021.

-13.1%



**Scotland** lagged behind the rest of the UK for the thirteenth consecutive period, with a decline of 14.8% vs. 2019. However, it was up 7.6% vs. 2021, the strongest year-on-year recovery.

-14.8%



## TOTAL FOOTFALL BY REGION (% CHANGE Yo3Y)

GROWTH RANK	REGION	% GROWTH Yo3Y
1	South West England	-8.7%
2	East Midlands	-8.7%
3	North West England	-10.4%
4	West Midlands	-10.7%
5	London	-11.5%
6	Yorkshire and the Humber	-11.6%
7	South East England	-12.8%
8	East of England	-12.9%

## ENGLISH REGIONAL BREAKDOWN

For the first time since June 2021 and April 2021 respectively, South West England and the East Midlands saw the strongest recovery in footfall of all the regions of the UK in August.

South West England saw a decline of 8.7% compared to 2019 but was up 1.6% year on year. However, this was the smallest year-on-year increase of all the regions.

The East Midlands also saw a decline of 8.7% compared to 2019 but was up 1.7% year on year. However, this was the second smallest year-on-year increase of all the regions.

The East of England saw the worst footfall recovery of all the regions of the UK, with a decline of 12.9% vs. 2019, but up 3.3% year on year.

## Best Performing Region(s)

# -8.7%

South West England (Yo3Y)

[+1.6% compared to August 2021]

East Midlands (Yo3Y)

[+1.7% compared to July 2021]

## Worst Performing Region

# -12.9%

East of England (Yo3Y)

[+3.3% compared to August 2021]



## TOTAL FOOTFALL BY CITY (% CHANGE Yo3Y)

GROWTH RANK	CITY	% GROWTH Yo3Y
1	Manchester	-6.0%
2	Edinburgh	-11.1%
3	Birmingham	-11.2%
4	Liverpool	-11.5%
5	Glasgow	-11.6%
6	Nottingham	-11.7%
7	Cardiff	-12.7%
8	Belfast	-13.1%
9	London	-15.0%
10	Bristol	-17.0%
11	Leeds	-22.1%

## CITY TRACKER

All major UK cities reflected the national picture with footfall down 13.0 vs 2019, although with significant variation and all cities showed an improvement of 6.2% on average vs. 2021.

For the fifth consecutive month, the best performing city was Manchester, with a decline of 6.0% compared to 2019 and a fall of 0.4% compared to last month.

Also, for the fifth consecutive month, the worst performing city was Leeds, with a decline of 22.1% compared to 2019 but a rise of 0.3% compared to last month.

## Best Performing City

# -6.0%

Manchester (Yo3Y)

[+9.2% compared to August 2021]

## Worst Performing City

# -22.1%

Leeds (Yo3Y)

[-8.9% compared to August 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](mailto:katarzyna.breczko@jci.com)

**BRC Press Office**  
 Sophie De Salis  
 T: +44 (0)207 854 8924  
 M: +44 (0)7515 053 449  
[sophie.desalis@brc.org.uk](mailto:sophie.desalis@brc.org.uk) / [media@brc.org.uk](mailto:media@brc.org.uk)

### DATA ENQUIRIES

**ASIM DEY**  
 Insight Executive  
 E: [insight@brc.org.uk](mailto:insight@brc.org.uk)

© 2022 British Retail Consortium. The contents of this report and those of all ancillary documents and preparatory materials are the sole property of BRC and are not to be copied, modified, published, distributed or commercially exploited other than with the express permission of BRC or for the purposes of journalistic comment and

