Sensormatic Solutions

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

February 2023

Period covered:
01 February – 28 February 2023

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

“Growth in footfall slowed this month after the rush of Christmas shopping and January sales. Some shoppers appeared to be reining in their shopping visits ahead of the April energy price rise. High streets continue to show the biggest improvement, particularly compared to last year when concerns around Covid kept people away from busy town and city centres. Retail Parks suffered as customers switched back to Shopping centres and High Streets, particularly with the ongoing return of the office commute.

“Consumer demand remains fragile, owing to the ongoing cost of living crisis and weak consumer confidence. Retailers will need to build on the improving footfall with further investment to encourage shoppers to visit their stores. However, it is vital that Government does not burden the retail industry with additional costs that hinder the evolution of thriving retail locations.”

Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

“Facing multidirectional headwinds – from the long shadow cast by covid to the ongoing consumer caution caused by the rising cost-of-living – we are, at least, starting to see footfall normalising.

“While the fluctuations in footfall are now less volatile, creating a new baseline against which to benchmark High Street performance, it doesn’t mean the footfall recovery has yet fully turned a corner. Retailers are still grappling with underlying uncertainty as they try to keep pace in the context of these multifaceted challenges. Looking ahead, delivering value – whether that’s through ranging or by giving shoppers compelling reasons to visit stores – will remain central to turning the tide on footfall performance.”

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

As footfall has now stabilised, albeit remaining lower than pre-pandemic levels, for the purpose of using recent performance benchmarks, we are reintroducing year-on-year (YoY) comparisons.

Executive Summary

The UK's footfall continued to fall in February, showing a decline from last month due to a high demand over the January sales. However, footfall has significantly improved on the level seen last year.

Total Retail Footfall Index

- Up by 10.4% points compared to Feb last year
- Down by 2.1 % points compared to last month
- Below the 3-mth average increase of +12.8%

+10.4%

% change vs 2022

[-8.8% compared to January 2019]

BY SHOPPING LOCATION:

High Street Footfall:

- Up by 17.8% points compared to Feb last year
- Down by 2.4 % points compared to last month
- Below the 3-mth average rise of 18.4%

+17.8%

% change vs 2022

[-7.7% compared to January 2019]

Retail Park Footfall:

- Down by 3.3% points compared to Feb last year
- Up by 0.2 % points compared to last month
- Same as the 3-month average decline of 3.3%

-3.3%

% change vs 2022

[-2.7% compared to January 2019]

Shopping Centre Footfall

- Up by 11.7% points compared to last year
- Down by 0.7% points compared to last month
- Above the 3-month average rise of 11.3%.

+11.7%

% change vs 2022

[-23.3% compared to January 2019]

RETAIL FOOTFALL

BRC - Sensormatic IQ Footfall Monitor

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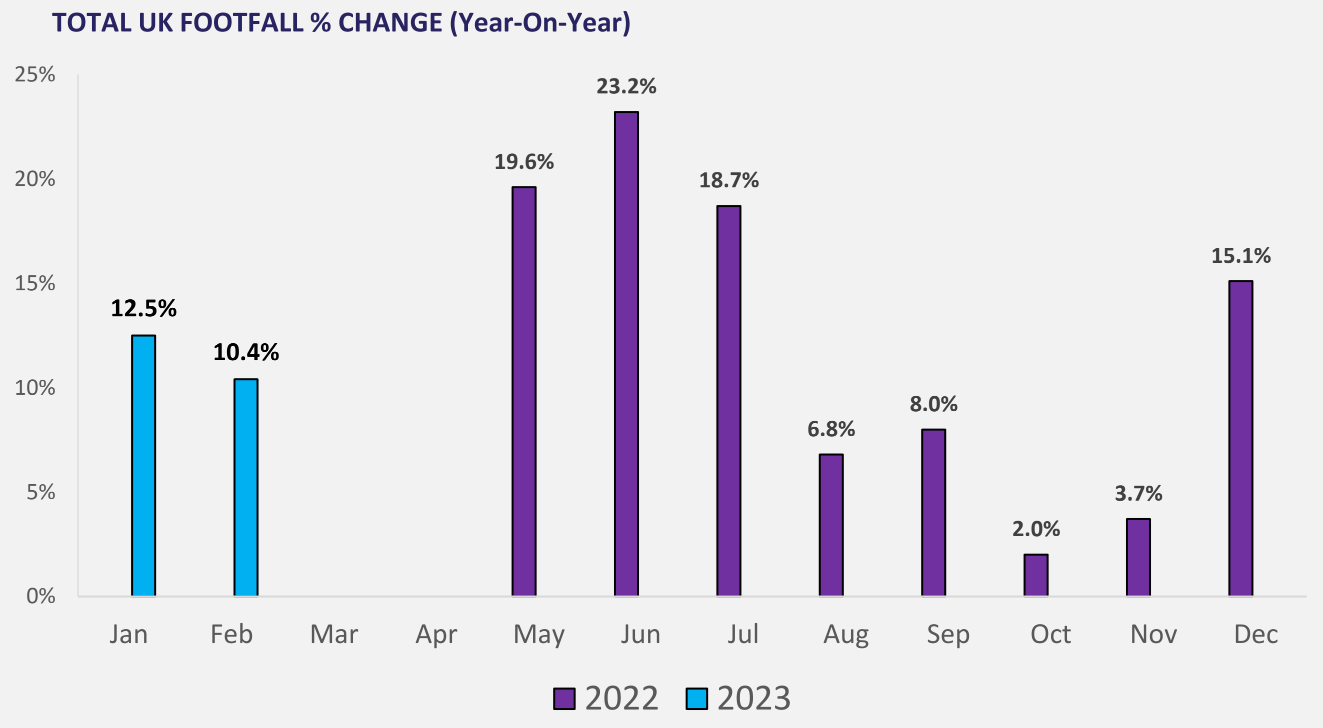

February Footfall Stumbles

Please note: Jan-Apr 2022 YoY data points have not been included in the chart above as some covid restrictions were in place for that time period in 2022.

- UK Footfall showed a decline of 2.1% in February 2023 compared to Jan 2023.
- This is due to January typically being a busy month as a result of post-Christmas sales.
- In addition, shoppers appeared to be holding back on their shopping visits owing to the ongoing cost-of-living crisis.

February

+10.4%

Year-on-Year

[**-8.8%** compared to 2019]

12-month average

+19.6%

Year-on-Year

[**-11.0%** compared to 2019]

TOTAL FOOTFALL – BY WEEK

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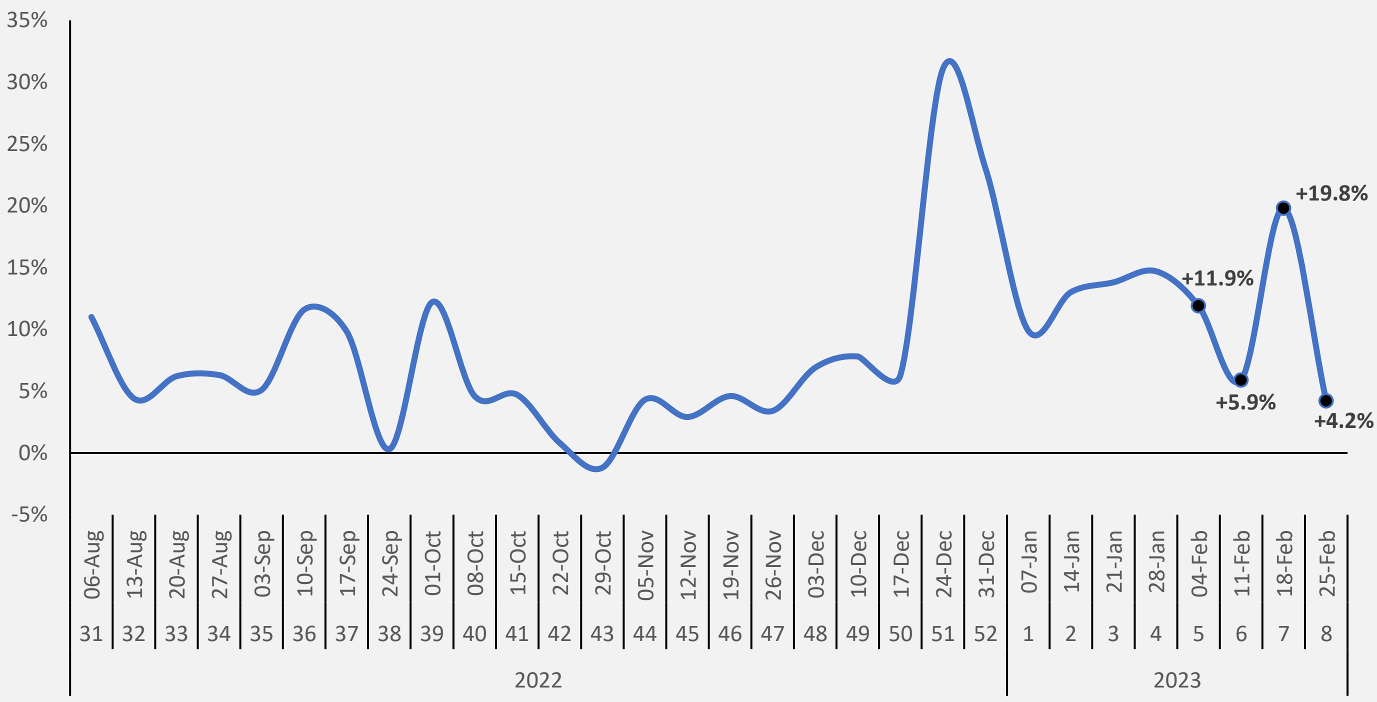
WEEKLY TOTAL RETAIL FOOTFALL (% CHANGE YoY)



February UK WEEKLY FOOTFALL

- Footfall is consistently higher for all four weeks of Feb 2023 compared to the equivalent weeks in Feb 2022
- Weekly % improvement in Feb 2023, compared to Feb 2022, does not fall below +4.2%
- Footfall improvement levels fluctuate across Feb 2023 when compared to Feb 2022
- The third week of Feb 2023 has the third-best weekly performance seen over the last six months

3rd Week of Feb-23 (12 – 18 Feb)

+19.8%

Year-on-Year

[**-6.1%** compared to Week 3 Feb 2019]

4th Week of Feb-23 (19 – 25 Feb)

+4.2%

Year-on-Year

[**-8.3%** compared to Week 4 Feb 2019]

FOOTFALL BY RETAIL LOCATION

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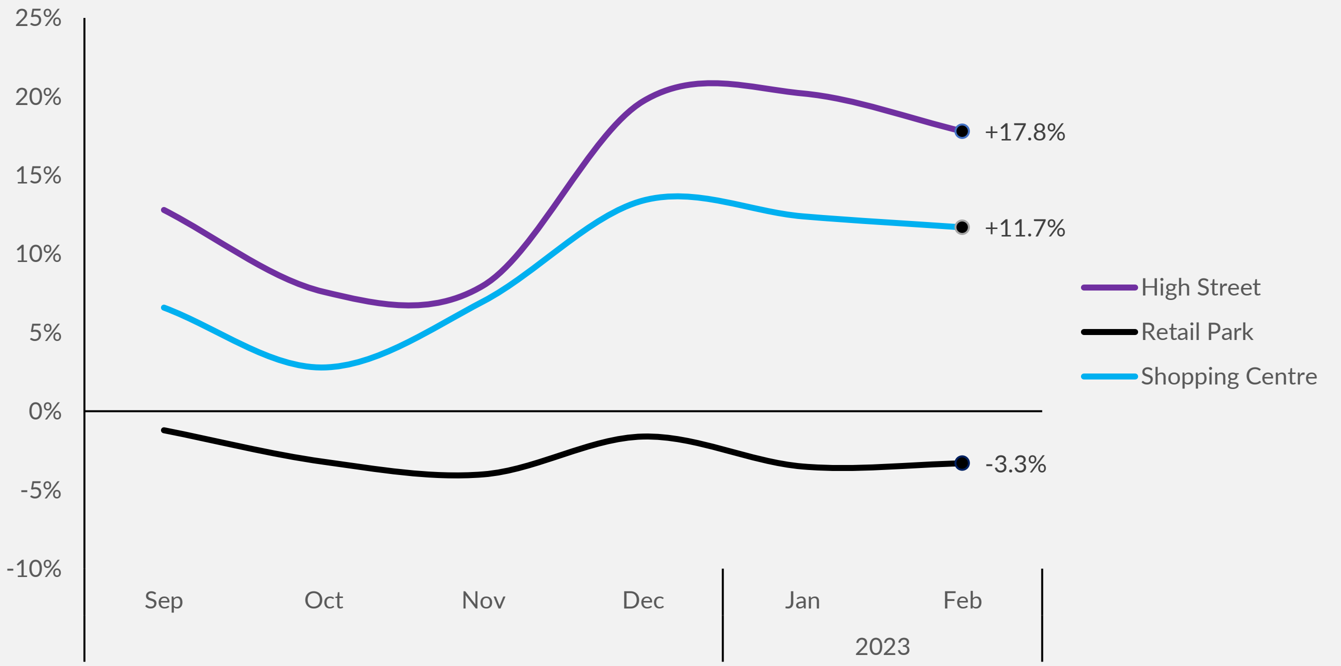
FOOTFALL BY LOCATION (% CHANGE YoY)



High Streets remain ahead of other locations

YoY: All retail footfall was up 10.4% on average

- **High Streets**
  - Up by +17.8% compared to Feb 2022
  - 3 month avg (YoY) up by +18.4%
  - 6 month avg (YoY) up by +24.9%
- **Shopping Centres**
  - Up by +11.7% compared to Feb 2022
  - 3 month avg (YoY) up by +11.3%
  - 6 month avg (YoY) up by +18.6%
- **Retail Parks**
  - Down by -3.3% compared to Feb 2022
  - 3 month avg (YoY) down by –3.3%
  - 6 month avg (YoY) up by +5.2%

Compared to pre-pandemic levels, Feb 2019:

- Footfall on **High Streets, Shopping Centres** and **Retail Parks** continue to **remain below pre-pandemic (2019) levels.**
- **Shopping Centres** exhibit the largest fall in footfall compared to Feb 2019.

High Streets

+17.8%

Year-on-Year

[**-7.7%** compared to February 2019]

Shopping Centres

+11.7%

Year-on-Year

[**-23.3%** compared to February 2019]

Retail Parks

-3.3%

Year-on-Year

[**-2.7%** compared to February 2019]

UK TOTAL FOOTFALL BY REGION

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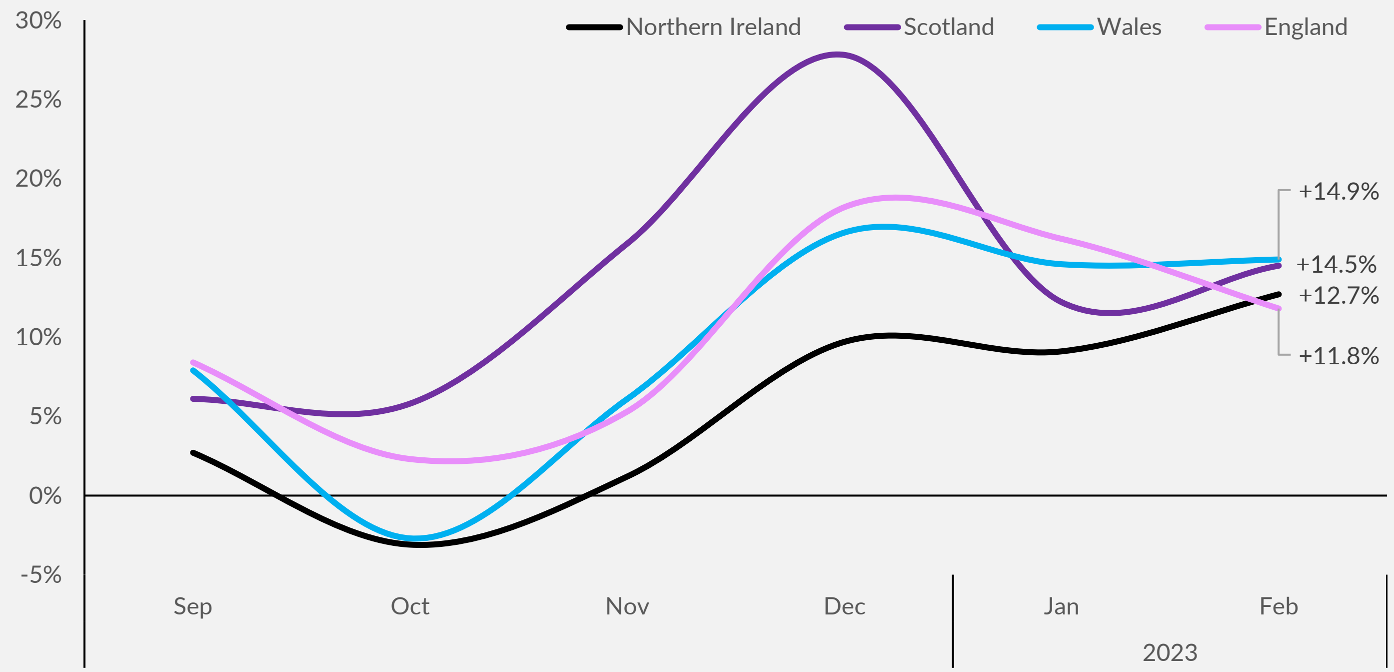
NATIONAL FOOTFALL (% CHANGE YoY)



UK Nations

vs. 2022

Wales Footfall:
- Strongest recovery of all the UK's nations
- Up by +14.9% vs 2022
- Down by -10% vs pre-pandemic.

+14.9%

Scotland Footfall:
- Up by +14.5% vs 2022
- Down by -11.1% vs pre-pandemic

+14.5%

Northern Ireland Footfall:
- Up by +12.7% vs 2022
- Down by -10.5% vs. pre-pandemic

+12.7%

England Footfall:
- Up by +11.8% vs 2022
- Down by -8.2% vs pre-pandemic

+11.8%

UK FOOTFALL BY ENGLISH REGION

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TOTAL FOOTFALL BY REGION (% CHANGE YoY)

CURRENT RANK	RANK CHANGE	REGION	% GROWTH YoY
1	↔	London	+15.8%
2	↔	East of England	+12.2%
3	↔	West Midlands	+9.3%
4	↔	South East England	+8.7%
5	↑+4	South West England	+8.3%
6	↑+1	North West England	+7.0%
7	↑+1	East Midlands	+6.9%
8	↓-3	Yorkshire and the Humber	+6.1%
9	↓-3	North East England	+3.6%

ENGLAND REGIONAL BREAKDOWN

- **London** again saw the strongest footfall performance for Feb 2023
- Up by 15.8 % compared to Feb 2022
- Top of the monthly English regional table, 8 out of the last 10 months.

- **South West England** saw the highest ascent up the ranking table for Feb 2023
- Up 4 spots, from position 9 to 5

- **North East England** and **Yorkshire and Humber** saw the biggest ranking drop
- Down 3 spots, from position 5 to 8
- Down 3 spots, from position 6 to 9 (respectively)

- **North East England** was the worst-performing region for Feb 2023
- Although up by +3.6% compared to Feb 2022

Best Performing Region

+15.8%

London (YoY)

[**-8.6%** compared to February 2019]

Worst Performing Region

+3.6%

North East England (YoY)

[**-12.7%** compared to February 2019]

UK FOOTFALL BY CITY

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TOTAL FOOTFALL BY CITY (% CHANGE Y3Y)

CURRENT RANK	RANK CHANGE	CITY	% GROWTH YoY
1	↔	Edinburgh	+27.8%
2	↑+2	Glasgow	+16.7%
3	↓-1	London	+15.8%
4	↑+4	Belfast	+12.7%
5	↔	Cardiff	+12.2%
6	↑+1	Nottingham	+10.5%
7	↑+2	Liverpool	+9.4%
8	↑+2	Leeds	+6.0%
9	↓-6	Manchester	+5.5%
10	↓-4	Birmingham	+4.0%
11	↔	Bristol	+0.1%

CITY TRACKER

Major Cities:
- Up compared to Feb 2022 last year
- Down by 2.8% compared to Jan 2023
- Remains below pre-pandemic 2019 levels

Best Performing City:
- **Edinburgh** (fourth month in a row)
- Up by +27.8% compared to Feb 2022 last year
- Up by 3.6% compared to Jan 2023

Best Performing City

+27.8%

Edinburgh (YoY)

[-**5.1%** compared to February 2019]

Worst Performing City:
- **Bristol** (third time in four months)
- Up by +0.1% compared to Feb 2022 last year
- Down by -2.8% compared to Jan 2023

Worst Performing City

+0.1%

Bristol (YoY)

[-**17.5%** compared to February 2019]

THE BRC & SENSORMATIC SOLUTIONS

Together with the BRC and its members, Sensormatic Solutions has worked to develop the most representative and robust indicator of UK store footfall traffic available – providing retailers with confidence to rely on the data for their business decision making.

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.

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