Sensormatic Solutions

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

November 2022

Period covered:
30 October – 26 November 2022

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"Footfall took another stumble as the cost of living crisis put off some consumers from visiting the shops in November. Others opted to stay home due to the scattering of rail strikes, or chose the World Cup over shopping visits. Many big cities were particularly hard hit, with Birmingham, Bristol and Manchester all seeing the biggest drops in footfall since January.

"Rising inflation and low consumer confidence continue to dampen spending expectations in the run up to Christmas. Despite retailers doing their best to keep prices as low as possible for their customers, financial concerns are trumping spending for many households. But, with three more weeks to Christmas, retailers hope that the festive spirit may still give a welcome boost to both footfall and retail sales."

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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"As retailers readied themselves for the start of peak trading 'proper', November brought a slew of disruption and opportunity, almost in equal measure. While train strikes did spell disruption to many, concerns that the untested format of a 'Christmas World Cup' could take the shine off retailers' Black Friday efforts proved unfounded, with the results in-store bettering the results on the field for England and Wales. With footfall on Black Friday surpassing 2021 levels, retailers will be hoping this signposts a resilience in consumer demand, even in the context of the rising cost-of-living, as they head into the critical December Christmas trading period."

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 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

November again saw a drop in total UK footfall, dampened by ongoing rail strikes, the rising cost-of-living and the start of the 2022 World Cup. On a more positive note, when compared to this time last year, we do see a 3.7% improvement, although retailers report lower level of sales conversion as returning consumers browse not buy.

Total Retail Footfall Index

Total UK footfall decreased by 13.3% in November (Yo3Y), 1.5 percentage points worse than October. This is worse than the 3-month average decline of 11.5%.

-13.3%

% change vs 2019

[+3.7% compared to November 2021]

BY SHOPPING LOCATION:

High Street Footfall

High Streets footfall declined by 13.6% in November (Yo3Y), 2.0 percentage points worse than last month's rate and worse than the 3-month average decline of 12.3%.

-13.6%

% change vs 2019

[+8.0% compared to November 2021]

Retail Park Footfall

Retail Parks saw footfall decrease by 4.2% (Yo3Y), 0.5 percentage points worse than last month's rate and worse than the 3-month average decline of 2.7%.

-4.2%

% change vs 2019

[-4.0% compared to November 2021]

Shopping Centre Footfall

Shopping Centre footfall declined by 23.2% (Yo3Y), 1.4 percentage points worse than last month's rate and below the 3-month average decline of 22.6%.

-23.2%

% change vs 2019

[+7.0% compared to November 2021]

RETAIL FOOTFALL

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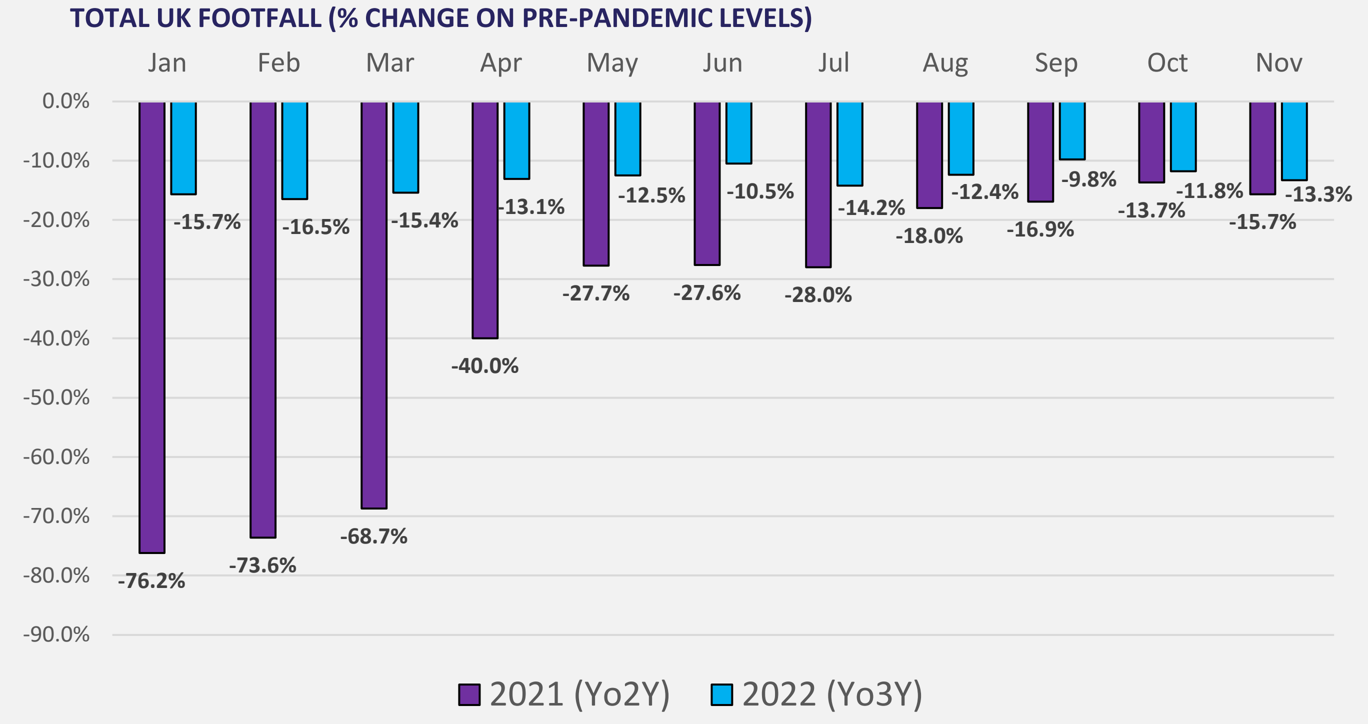

Footfall stumbles ahead of Christmas

UK Footfall took a step in the wrong direction again in November, impacted by the cost-of-living crisis, rail strikes in big cities and the World Cup.

Compared to the previous month, November's performance worsened slightly, seeing a 1.5 percentage point fall, and remaining below the normal pre-pandemic levels.

November

-13.3%

Year-on-Three-Year

[+3.7% compared to 2021]

12-month average

-13.2%

Year-on-Three-Year

[+37.8% compared to 2021]

TOTAL FOOTFALL – BY WEEK

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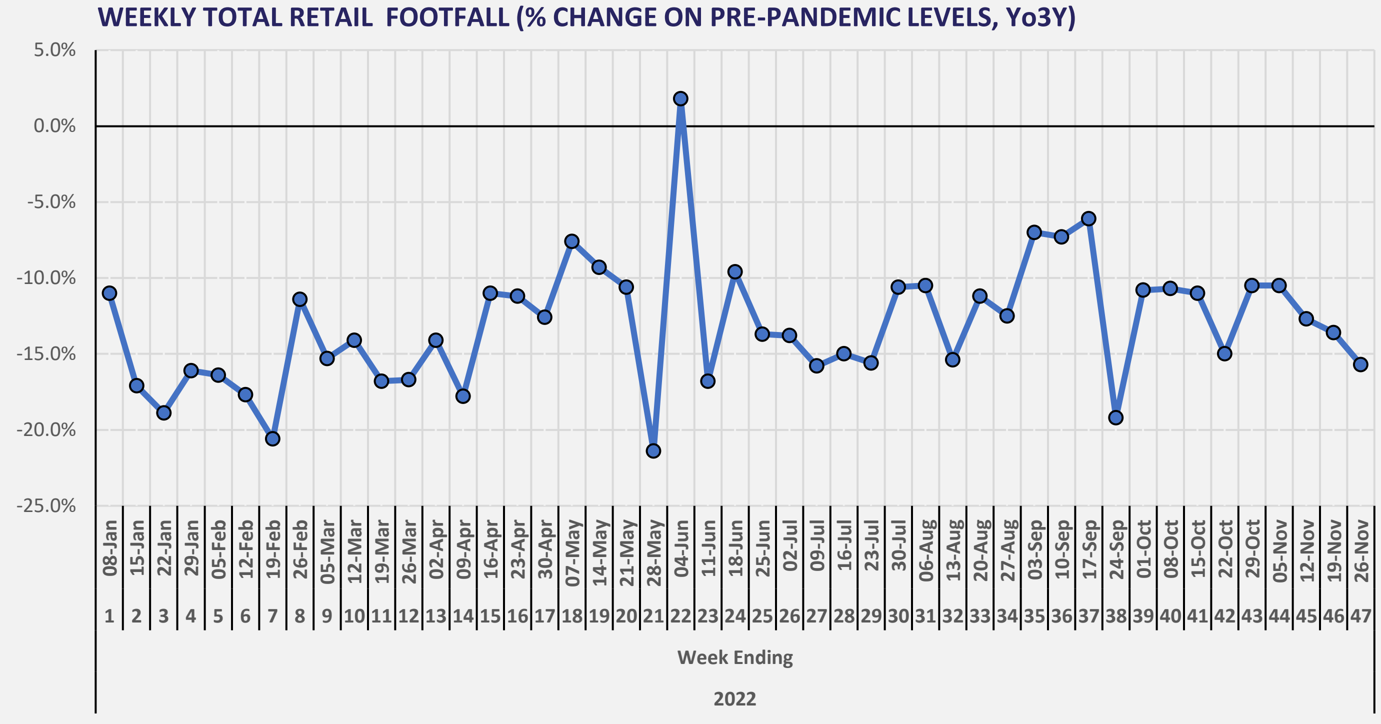

NOVEMBER UK WEEKLY FOOTFALL

When comparing Nov 2022 weekly data against Nov 2019, footfall is comparatively low for all four weeks of 2022. However, the percentage difference between the 2 years never falls below -16%.

The first week of Nov shows the strongest percentage difference compared to 2019, at -10.5%.

The World Cup would have contributed to the weakest decline of 15.7% seen in the last week of Nov 2022 when compared to the last week of Nov 2019.

Week 44 (30 Oct – 05 Nov)

-10.5%

Year-on-Three-Year

[**+4.3%** compared to 1st wk of Nov 2021]

Week 47 (20 Nov – 26 Nov)

-15.7%

Year-on-Three-Year

[**+3.4%** compared to 4th week of Nov 2021]

FOOTFALL BY RETAIL LOCATION

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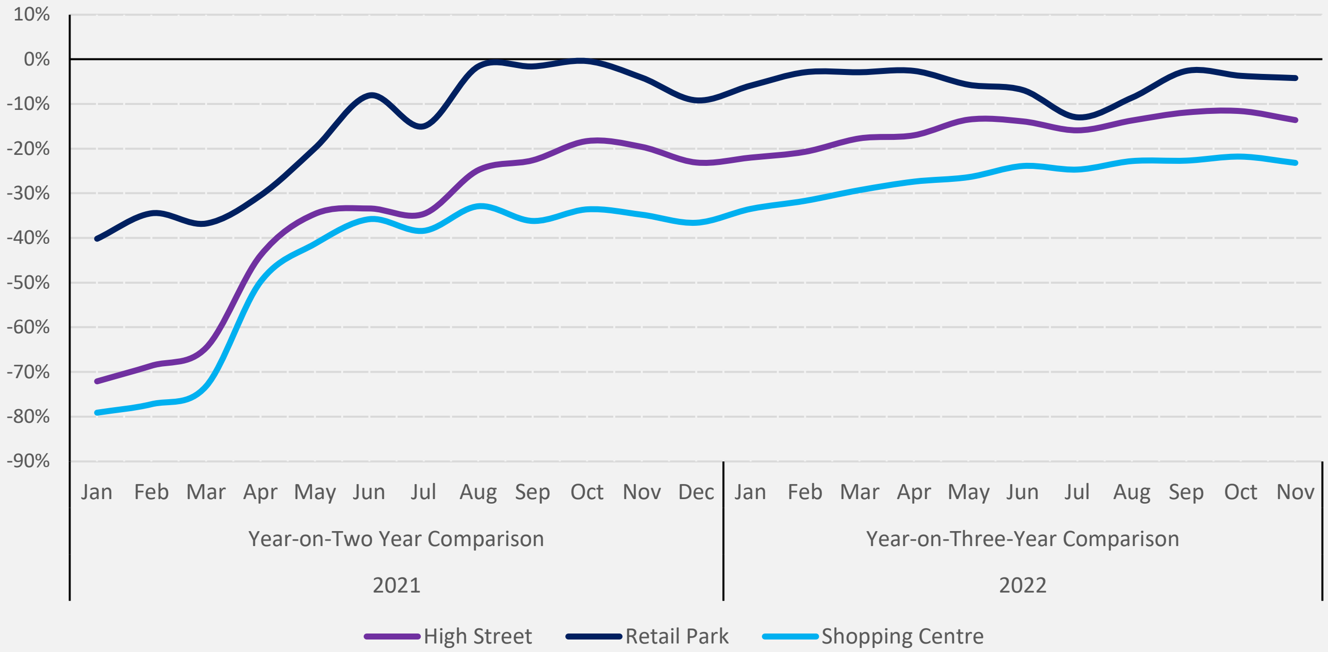
FOOTFALL BY LOCATION (% CHANGE ON PRE-PANDEMIC LEVELS)



Retail Park recovery continues to remain ahead of other locations

Compared to pre-pandemic, November 2019

All retail footfall was down 13.3% on average.

Retail Parks saw a decline of 4.2%. This compares to the 3 month and 6 month averages of -2.7% and -6.5%, respectively.

High Streets saw a decline of 13.6%. This compares to the 3 month and 6 month averages of -12.3% and -13.4%, respectively.

Shopping Centres saw a decline of 23.2%. This compares to the 3 month and 6 month averages of -22.6% and -23.2%, respectively.

Compared to last year, Nov 2021

Footfall on **High Streets** and **Shopping Centres** improved again, with High Streets showing the best performance for the eighth consecutive month.

However, **Retail Park** footfall fell for the fifth consecutive month compared to 2021.

Retail Parks

-4.2%

Year-on-Three-Year

[**-4.0%** compared to November 2021]

High Streets

-13.6%

Year-on-Three-Year

[**+8.0%** compared to November 2021]

Shopping Centres

-23.2%

Year-on-Three-Year

[**+7.0%** compared to November 2021]

UK TOTAL FOOTFALL BY REGION

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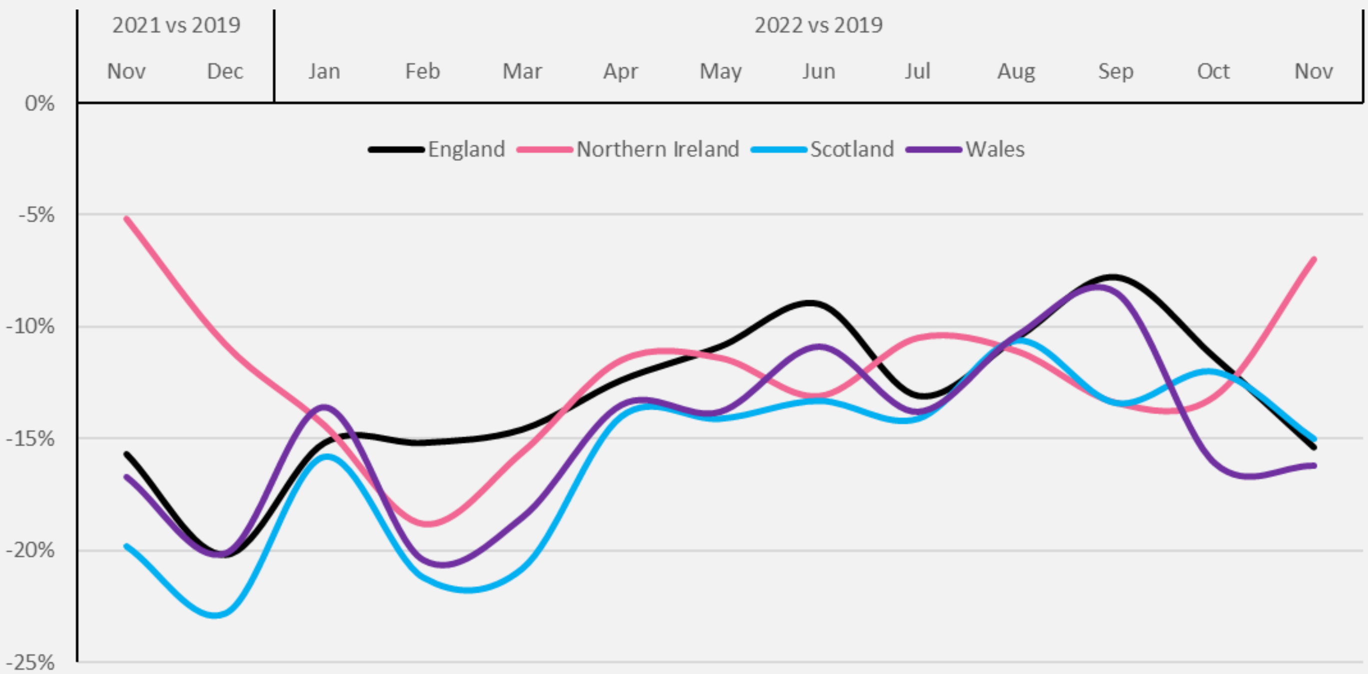
NATIONAL FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS)

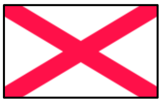


UK Nations

vs. 2019

Northern Ireland saw the strongest recovery of all the UK's nations, with a decline of 7.0% vs pre-pandemic, but is up 1.2% vs 2021.

-7.0%



Scotland saw a decline of 15.0% vs pre-pandemic, but is up 15.9% vs 2021.

-15.0%

England saw a footfall decline of 15.4% vs pre-pandemic, but is up by 5.3% vs. 2021.

-15.4%

Wales saw a footfall decline of 16.2% and again lagged behind the rest of the UK for the second month in a row. However, Wales saw an increase of 6.1% vs. 2021.

-16.2%

UK FOOTFALL BY ENGLISH REGION

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TOTAL FOOTFALL BY REGION (% CHANGE Yo3Y)

CURRENT RANK	RANK CHANGE	REGION	% GROWTH Yo3Y
1	-	North West England	-11.7%
2	+2	Yorkshire and the Humber	-13.2%
3	-	West Midlands	-15.3%
4	-2	South West England	-15.7%
5	+3	London	-15.7%
6	-	South East England	-16.1%
7	-2	East of England	-17.3%
8	-1	East Midlands	-18.5%
9	-	North East England	-18.8%

ENGLISH REGIONAL BREAKDOWN

The North West again saw the strongest recovery in footfall in November, with a decline of 11.7%. This means, with regards to recovery, it has topped the monthly English regional table 9 times in 2022.

The North East saw a decline for the second consecutive month of 18.8% compared to 2019, but was up 3.3% year-on-year.

London saw the highest ascent up the ranking table, from position 8 to 5.

The East of England saw the biggest ranking drop, from position 5 to 7.

Best Performing Region(s)

-11.7%

North West England (Yo3Y)

[**+4.9%** compared to November 2021]

Worst Performing Region

-18.8%

North East England (Yo3Y)

[**+3.3%** compared to November 2021]

UK FOOTFALL BY CITY

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TOTAL FOOTFALL BY CITY (% CHANGE Yo3Y)

CURRENT RANK	RANK CHANGE	CITY	% GROWTH Yo3Y
1	+2	Belfast	5.7%
2	-1	Manchester	-7.6%
3	-1	Liverpool	-8.5%
4	-	Edinburgh	-9.1%
5	-	Glasgow	-12.7%
6	+1	London	-13.8%
7	+4	Cardiff	-13.8%
8	-2	Nottingham	-15.8%
9	-1	Leeds	-16.3%
10	-	Bristol	-18.1%
11	-2	Birmingham	-19.4%

CITY TRACKER

All major UK cities reflected the national picture with footfall down 11.8% vs 2019, although with significant variation, and cities as a whole, showed an improvement of 3.9% on average compared to 2021. Despite ongoing rail strikes, this appears to be counter-balanced with footfall from regular office visits and retailers attracting customers in by bringing forward Christmas purchases.

For the first time in 2022, the best-performing city was Belfast, with an increase of 5.7% compared to 2019 and an improvement of 14.3% compared to last month.

For the first time since October 2018, the worst-performing city was Birmingham, with a decline of 19.4% compared to 2019 but an increase of 0.2% compared to last month.

Best Performing City

+5.7%

Belfast (Yo3Y)

[**+1.7%** compared to November 2021]

Worst Performing City

-19.4%

Birmingham (Yo3Y)

[**+0.2%** compared to November 2021]

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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