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A comprehensive measure of
store and centre entries

Benchmark by location type and
city

Compare weekly performance
by Country

BRC-SENSORMATIC IQ FOOTFALL MONITOR

February 2021

Period covered:
31 January 2021 – 27 February 2021

ShopperTrak is now part of Sensormatic Solutions. Sensormatic IQ is its new intelligent operating platform, which unifies diverse data and insights to drive improved shopper experiences and retail outcomes. The Footfall monitor name has changed accordingly.

Press commentary



Helen Dickinson OBE | Chief Executive | British Retail Consortium

“Footfall remained down by three quarters during the second full month of lockdown. Shopping centres continued to suffer the most due to their high proportion of “non-essential” retailing, whereas retail parks benefitted from the presence of large essential retailers such as supermarkets and health stores. While footfall improved slightly due to slowing Covid infections boosting consumer confidence, it will be a difficult time for retail until businesses are permitted to reopen in April.

“Retailers welcomed the Chancellor’s extension of key business funding schemes in Wednesday’s Budget. Nonetheless, the real challenge will arise in April, as tens of thousands of “non-essential” retailers hold their breath to see if demand returns to stores. Despite the support offered by the Chancellor, the retail industry is not out of the woods yet. In order to support a much needed recovery in the industry and the three million jobs it supports, the Government must ensure the UK’s state aid rules allow businesses to fully access the grants and loans that have been announced.”



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Andy Sumpter | Retail Consultant - EMEA | Sensormatic Solutions

“With lockdown fatigue looming large, February saw another month of limited footfall on the High Street, as non-essential retail remained closed and stores shuttered. February did see a small lift in shopper counts compared to January, perhaps due to the ongoing success of the vaccine roll-out and the roadmap for unlocking announced earlier in the month giving consumer confidence a boost.

However, while there is light at the end of tunnel, the outlook between now and 12 April, when non-essential retail can reopen, remains bleak. Many retailers will be holding out hope that, once again, consumers will return when they reopen and that pent-up demand for real life retail experiences will sustain the High Street’s recovery.”

Executive Summary

The UK's footfall improved moderately from the significant contraction seen in January's lockdown. However it remained significantly down on the prior year as this third lockdown continues.

Total Retail Footfall Index

With the UK still in lockdown, year on year UK Footfall decreased by 73.5% in February, with only a 3.4 percentage point improvement from January. Following January, this is the second largest drop in the UK footfall since May 2020 (-81.6%).

-73.5%

% change Year on Year

SHOPPING LOCATIONS:

High Street Footfall

Footfall on High Streets declined by 68.3% year on year. Following January, this was the deepest decline since May 2020 (-77.8%) and worse than both the 3- and 12-month average declines of 60.6% and 55.7%, respectively.

-68.3%

% change Year on Year

Retail Park Footfall

Retail Parks saw footfall decrease by 34.5% year on year. Following January, this was the deepest decline since May 2020 (-55.0%) and worse than both the 3- and 12-month average declines of 29.0% and 28.7%, respectively.

-34.5%

% change Year on Year

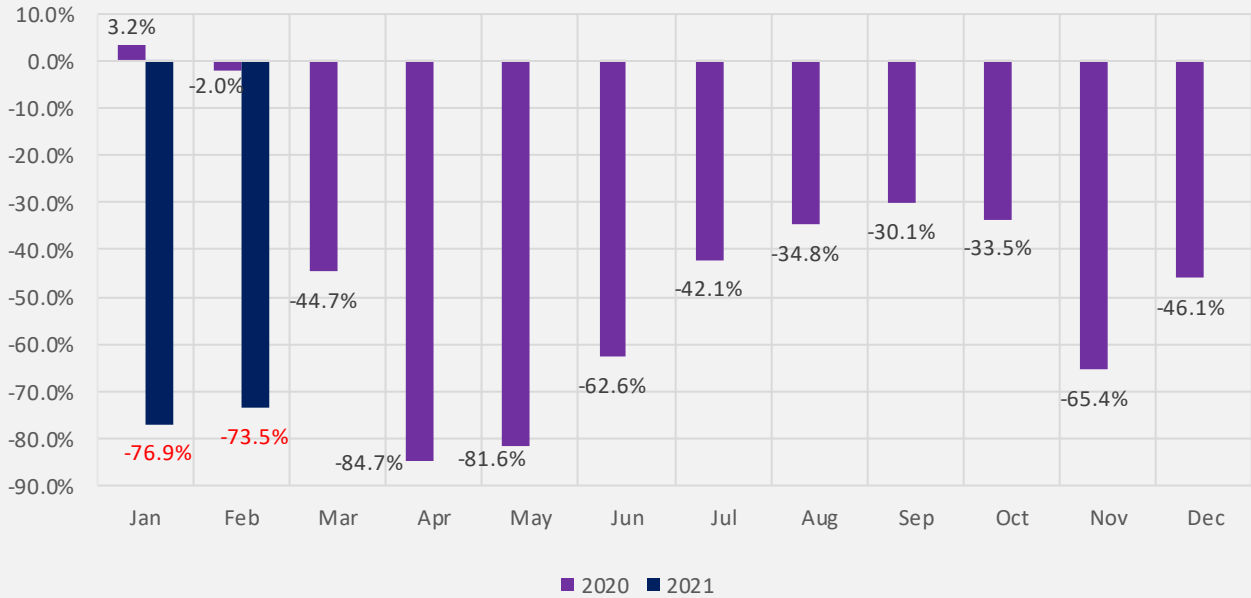
Shopping Centre Footfall

Shopping Centre footfall declined by 75.7% year on year. Similar to High Streets and Retail Parks, excluding January, this was the deepest decline since May 2020 (-84.9%). This is below the 3- and 12-month average declines of 63.7% and 57.7%, respectively.

-75.7%

% change Year on Year

TOTAL UK RETAIL FOOTFALL (% CHANGE YOY)



UK FOOTFALL CONTINUES TO REMAIN IN SIGNIFICANT DECLINE

UK footfall was still in significant decline throughout February (-73.5%), although a small improvement was seen compared to January (-76.9%).

However, this is unsurprising as all “non-essential” stores are closed with all UK regions in lockdown.

Excluding January, this has been the largest decline on footfall since May 2020 and is well below the 12-month average of 54.4%.

February

-73.5%

Year on Year

12-month average

-54.4%

Year on Year

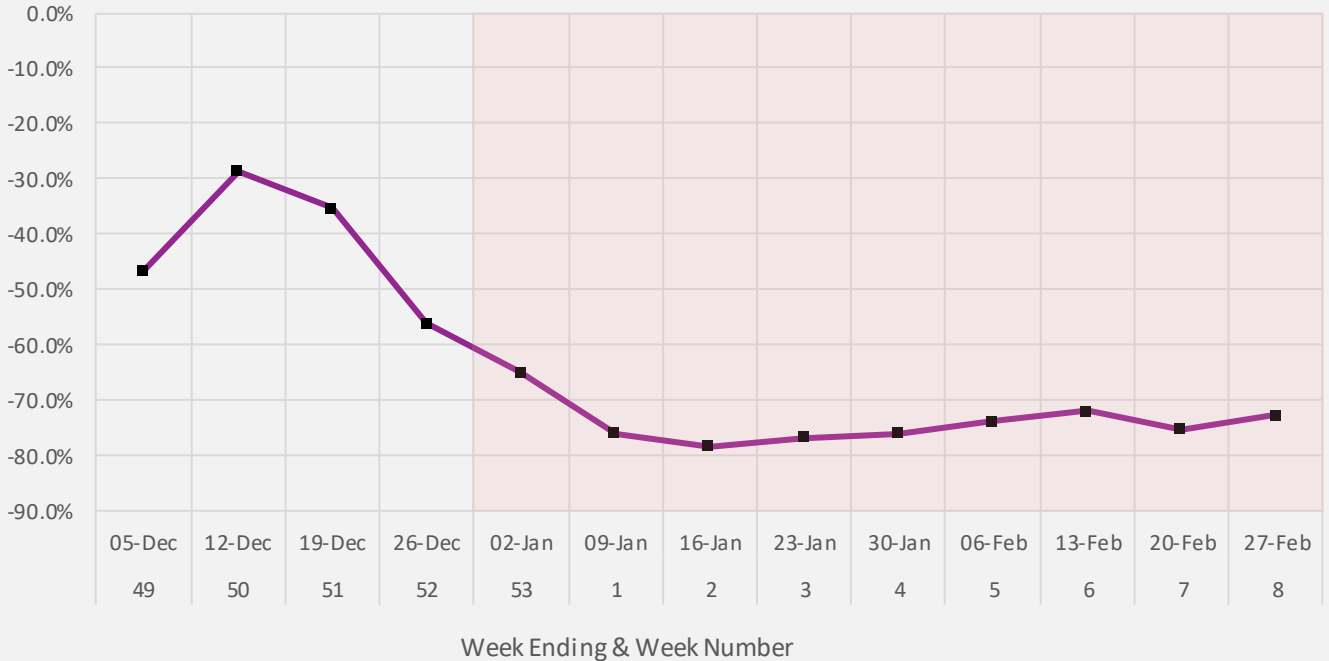
TOTAL FOOTFALL – BY WEEK

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FOOTFALL % CHANGE YOY BY WEEK



FEBRUARY UK WEEKLY FOOTFALL

Footfall in February continued to remain consistently below -70% throughout the month, as lockdown continued throughout the UK.

The shallowest decline was seen in week 6 (-72.0%) followed by the steepest decline in week 7 (-75.3%).

Subsequently, there was a slight improvement over the final week, 8 (-72.8%).

Week 6 (07 Feb – 13 Feb)

-72.0%

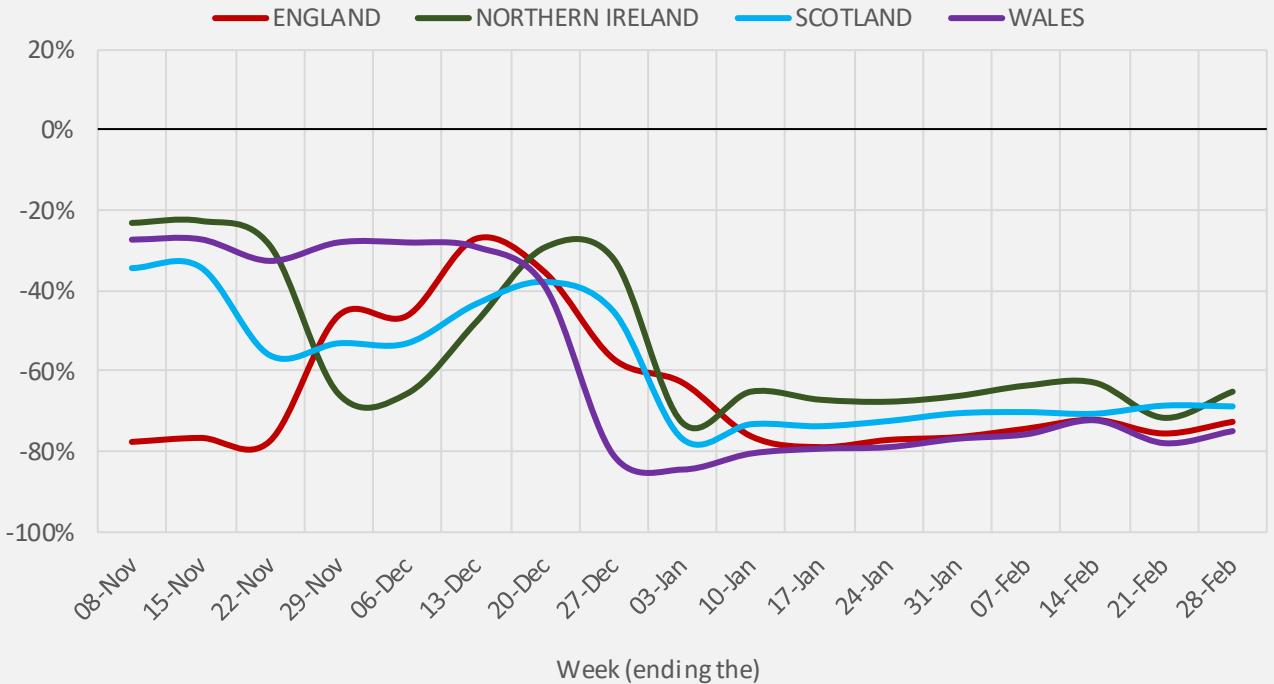
Shallowest decline in Feb, Year on Year

Week 7 (14 Feb – 20 Feb)

-75.3%

Steepest decline in Feb, Year on Year

REGION FOOTFALL % CHANGE YOY BY WEEK

FEBRUARY WEEKLY
REGION FOOTFALL

All countries show a similar story in February, a small improvement over the preceding month of January but still far below the footfall seen in November and December. However, this is to be expected following the lockdown which came into effect at the beginning of this year.

Wales again saw the most substantial decline in footfall, with footfall in weeks 1 and 3 below -75%.

Best Performing Region, Week 2

-62.9%

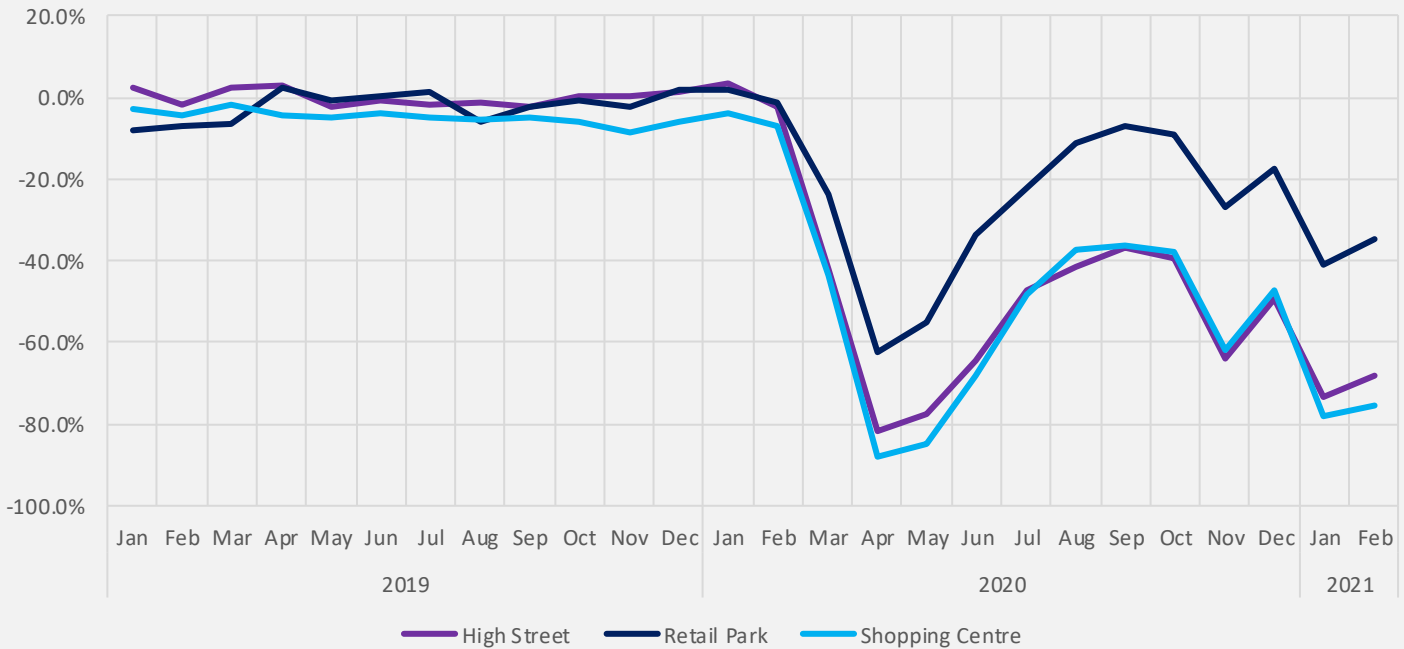
Northern Ireland

Worst Performing Region, Week 3

-78.0%

Wales

FOOTFALL % CHANGE YOY BY LOCATION



SHOPPING CENTRES SEE STEEPEST DECLINE OF ALL LOCATIONS

Although footfall recovered marginally in February, it still did not reach the levels seen pre-January due to the country remaining in lockdown throughout the month.

Retail Parks saw the steepest rate of gain, increasing by 6.4 percentage points to reach a decline of 34.5%.

Compared to Shopping Centres and Retail Parks, the High Street rate of gain sits in the middle, increasing by 5.0 percentage points to reach a decline of 68.3%.

Again this month, Shopping Centres saw the weakest performance, increasing by 2.5 percentage points to reach a decline of 75.7%.

Retail Parks

-34.5%

Year on Year

Shopping Centres

-75.7%

Year on Year

UK FOOTFALL BY REGION

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SHOPPING CENTRE FOOTFALL BY REGION

GROWTH RANK	REGION	% GROWTH YOY
1	North East	-67.5%
2	London	-68.5%
3	North West	-74.6%
4	West Midlands	-75.0%
5	Scotland	-75.2%
6	South East	-76.6%
7	Northern Ireland	-77.2%
8	East Midlands	-78.2%
9	Yorkshire and the Humber	-80.7%
10	South West	-81.2%
11	East	-81.4%
12	Wales	-87.9%

REGIONAL BREAKDOWN

Of all the regions in the UK, Shopping Centres in Wales saw the steepest rate of declining footfall for the third consecutive month, with -87.9% year on year for February.

North East Shopping Centres were the best performing of all the UK regions for the second consecutive month, with a decline of 67.5%, compared to January's decline of 70.6%.

Best Performing Region

-67.5%

North East

Worst Performing Region

-87.9%

Wales

TOTAL FOOTFALL BY CITY

GROWTH RANK	CITY	% GROWTH YOY
1	Belfast	-67.7%
2	Glasgow	-71.6%
3	London	-75.4%
4	Nottingham	-75.6%
5	Cardiff	-76.6%
6	Bristol	-77.4%
7	Leeds	-79.5%
8	Liverpool	-79.5%
9	Birmingham	-80.0%
10	Manchester	-88.3%
11	Portsmouth	-92.9%

CITY TRACKER

On a total basis, footfall across cities in the UK was again significantly down on the levels seen last year.

The best performing city was Belfast for the second consecutive month with a decline of 60.7%, having topped the growth ranking last month.

The worst performing city was Portsmouth for the fourth consecutive month, with a decline of 92.9%. It was also the eighth time the city has sat at the bottom of the growth rankings table in the last twelve months.

Best Performing City

-67.7%

Belfast

Worst Performing City

-92.9%

Portsmouth

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 1737070562
katarzyna.breczko@jci.com

BRC Press Office
Lara Conradie
T: +44 (0)207854 8924
M: +44 (0)7785 612214
lara.conradie@brc.org.uk / media@brc.org.uk

DATA ENQUIRIES



JAMES HARDIMAN
ANALYST

E: james.hardiman@brc.org.uk
T: +44 (0)207 854 8970

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