BRC

Sensormatic Solutions

A comprehensive measure of store and centre entries

Benchmark by location type and city

Compare weekly performance by Country

BRC-SENSORMATIC IQ FOOTFALL MONITOR

May 2021

Period covered:
2 – 29 May 2021

Press commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"May saw footfall levels improve across the UK's high streets, retail parks and shopping centres. This was in part due to the further easing of Covid restrictions, including the reopening of indoor hospitality, which enticed consumers back to shopping locations knowing they could grab a drink or something to eat whilst enjoying a spot of retail therapy. The successful vaccination roll-out has also boosted consumer confidence and contributed to the improvement in footfall. However, restrictions on travel have denied many businesses, particularly those in our larger town and city centres, of vital overseas tourist spending.

"Nonetheless, footfall levels are still significantly down on two years ago. Many high streets have an increasing number of vacant shops, and many retailers still face significant and mounting debts, and with £2.9 billion in unpaid rents built up over the pandemic. The Government should ringfence these lockdown rent debts to provide the breathing space for footfall and cash flows to recover, and enable landlords and tenants to work on equitable and long-term solutions for the future and avert terminal decline in many communities."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"May saw a slow but steady recovery for the High Street as shoppers continued to return to bricks-and-mortar stores. The improved shopper counts will have been helped by the reopening of indoor hospitality, which helped drive ambient footfall as consumers combined store visits with leisure and socialising.

"While still down compared to pre-pandemic levels, we've seen cautious but consistent improvement to footfall with each passing month as society unlocks and the vaccine roll-out continues at pace, giving retailers a cause for cautious optimism. However, the prospect of a sustained recovery is still very much hanging in the balance, with variants of concern and an uptick in infection rates threatening to undermine consumer confidence, and the final stage of unlocking far from a fait accompli."

Executive Summary

Note: For meaningful comparisons to changes in footfall, all 2021 figures are compared with 2019 (pre-pandemic). This means our 2021 figures are now year-on-two-years (Yo2Y), rather than year-on-year (YoY). With many retail outlets bouncing between being opened and closed in 2020, comparison with 2020 would not provide any useful insight.

The UK's retail Footfall levels continued a slow but steady recovery in May. This was in part due to the further easing of Covid restrictions, including the reopening of indoor hospitality. The successful vaccination roll-out has also boosted consumer confidence and contributed to the rise in footfall. However, footfall levels are still significantly down on two years ago. Many high streets have an increasing number of vacant shops, and many retailers still face significant and mounting debts.

Total Retail Footfall Index

Total UK Footfall decreased by 27.7% in May (Yo2Y), with a 12.3 percentage point improvement from April. This is above the 3-month average decline of 46.9%.

-27.7%

% change Year on Two Year

SHOPPING LOCATIONS:

High Street Footfall

Footfall on High Streets declined by 34.6% in May (Yo2Y). This is above the 3-month average decline of 48.7%.

-34.6%

% change Year on Two Year

Retail Park Footfall

Retail Parks saw footfall decrease by 19.9% (Yo2Y), 10.6 percentage points above last month's rate. This is above the 3-month average decline of 32.9%.
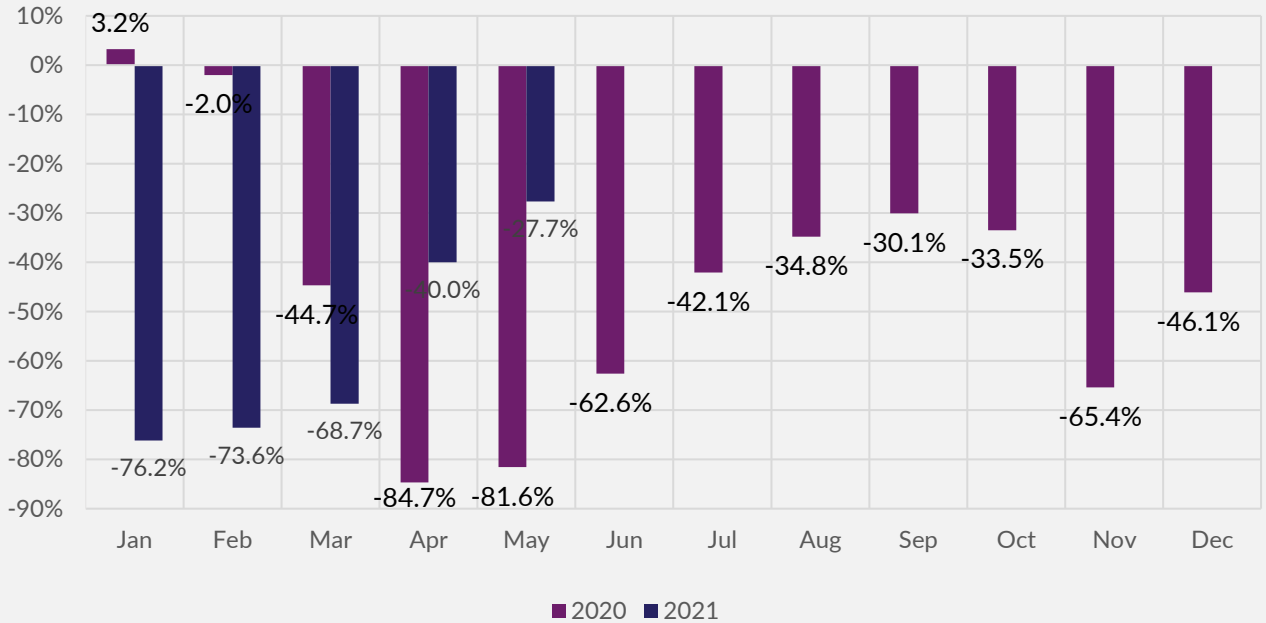
-19.9%

% change Year on Two Year

Shopping Centre Footfall

Shopping Centre footfall declined by 41.3% (Yo2Y). This is above the 3-month average decline of 56.2%.

-41.3%

% change Year on Two Year

TOTAL UK RETAIL FOOTFALL (% CHANGE ON 2019)

Legend: ■ 2020 ■ 2021

Data labels: 3.2%, -2.0%, -44.7%, -68.7%, -84.7%, -81.6%, -76.2%, -73.6%, -40.0%, -27.7%, -62.6%, -42.1%, -34.8%, -30.1%, -33.5%, -65.4%, -46.1%

Footfall Recovery Continues As Hospitality Returns

UK Footfall levels continued to recover in May from those seen during the first three months of the year, with non-essential stores opening in the second week of last month.

The month's performance was a 12.3 percentage point improvement from that seen in April, but still remained well below the normal pre-pandemic levels.

May
-27.7%
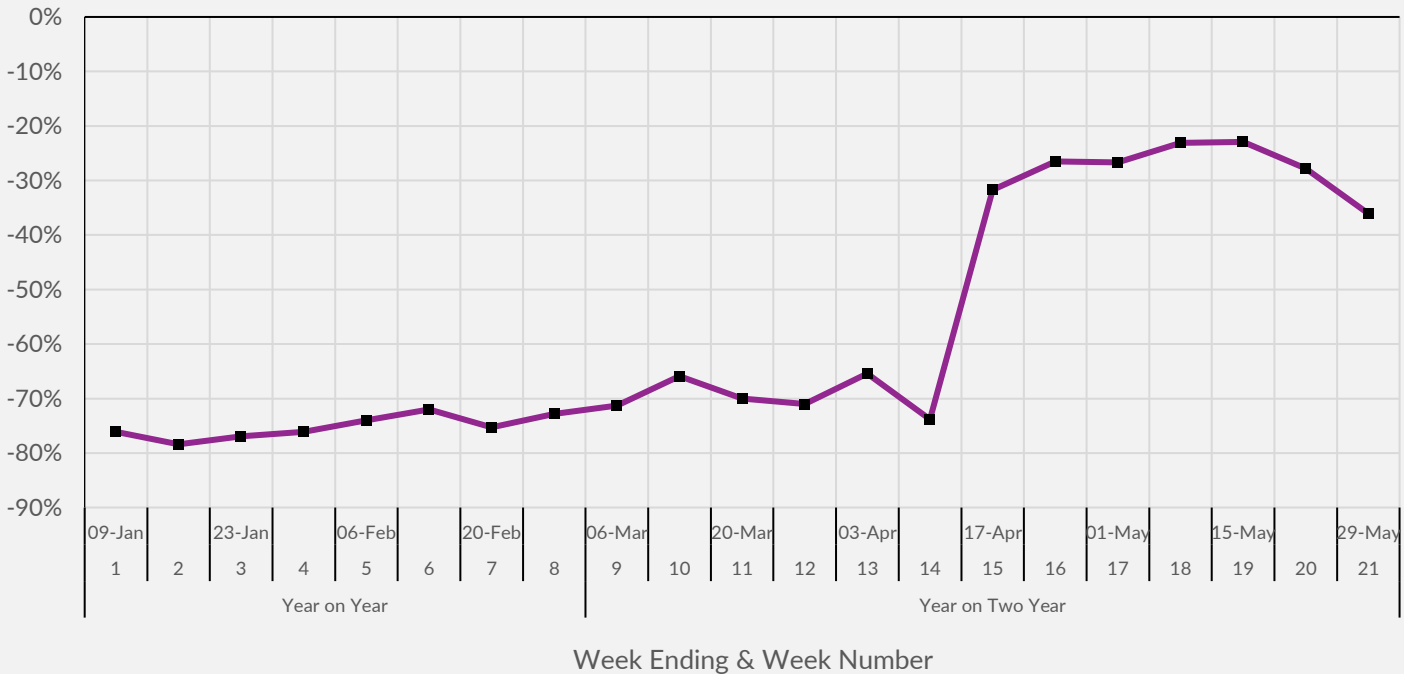Year on Two Year

12-month average
-39.8%
Year on Year

FOOTFALL % CHANGE BY WEEK

MAY UK WEEKLY FOOTFALL

Footfall in May remained above -37% throughout the month, as restrictions eased.

The steepest decline was seen in the final week, 21 (-36.1%), whilst the smallest decline was in week 19 (-22.9%).

Footfall levels remained broadly stable over the first three weeks, as non-essential stores were open, with a dip towards the end of the month.
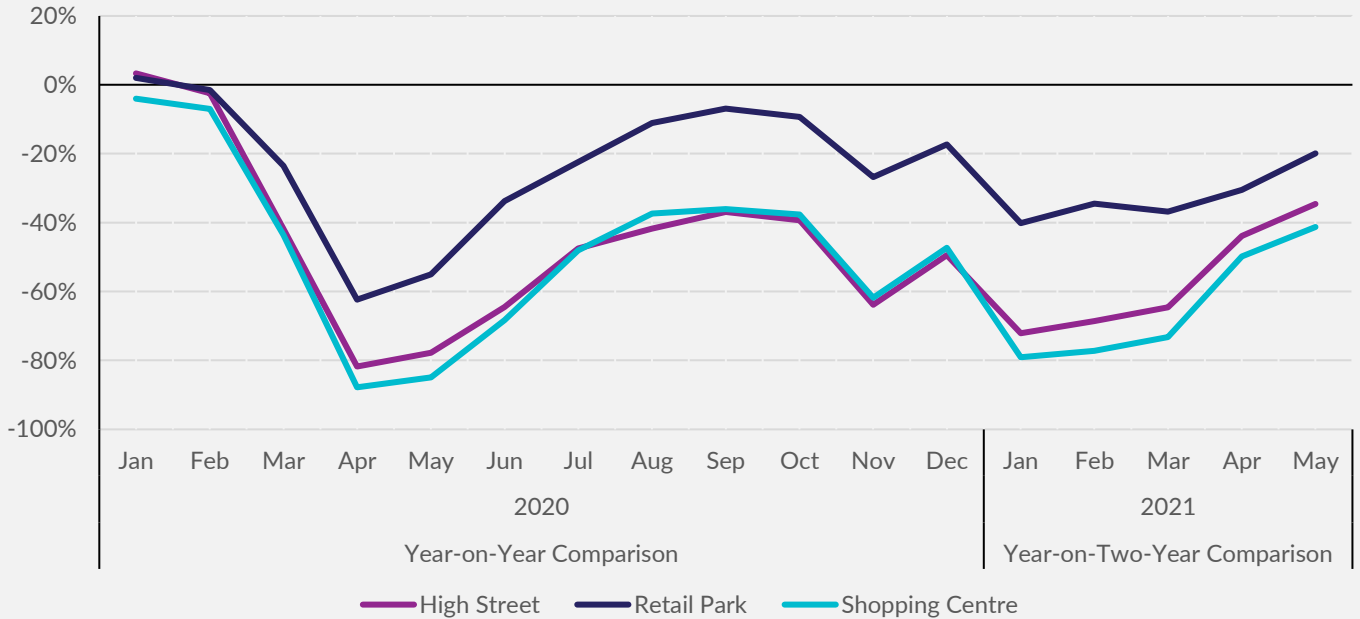
Week 19 (9 – 15 May)

-22.9%

Year on Two Year

Week 21 (23 – 29 May)

-36.1%

Year on Two Year

FOOTFALL BY LOCATION (% CHANGE ON 2019)

Year-on-Year Comparison (2020) / Year-on-Two-Year Comparison (2021)

High Street — Retail Park — Shopping Centre

Retail Parks Remain Ahead of Other Locations, But Gap Narrows

In line with the overall trend, each shopping destination saw an increase in footfall from that seen in April. However, the locations were unable to achieve levels similar to that seen during 'normal' trading conditions.

In May, Retail Parks saw a decline of 19.9% in comparison to the levels of footfall seen at the same point in 2019. This was a 10.6 percentage point improvement from April.

High Street Footfall in the UK improved by 9.3 percentage points from April, to a decline of 34.6% in May.

Shopping Centres improved by 8.5 percentage points from April, to a decline of 41.3% in May.
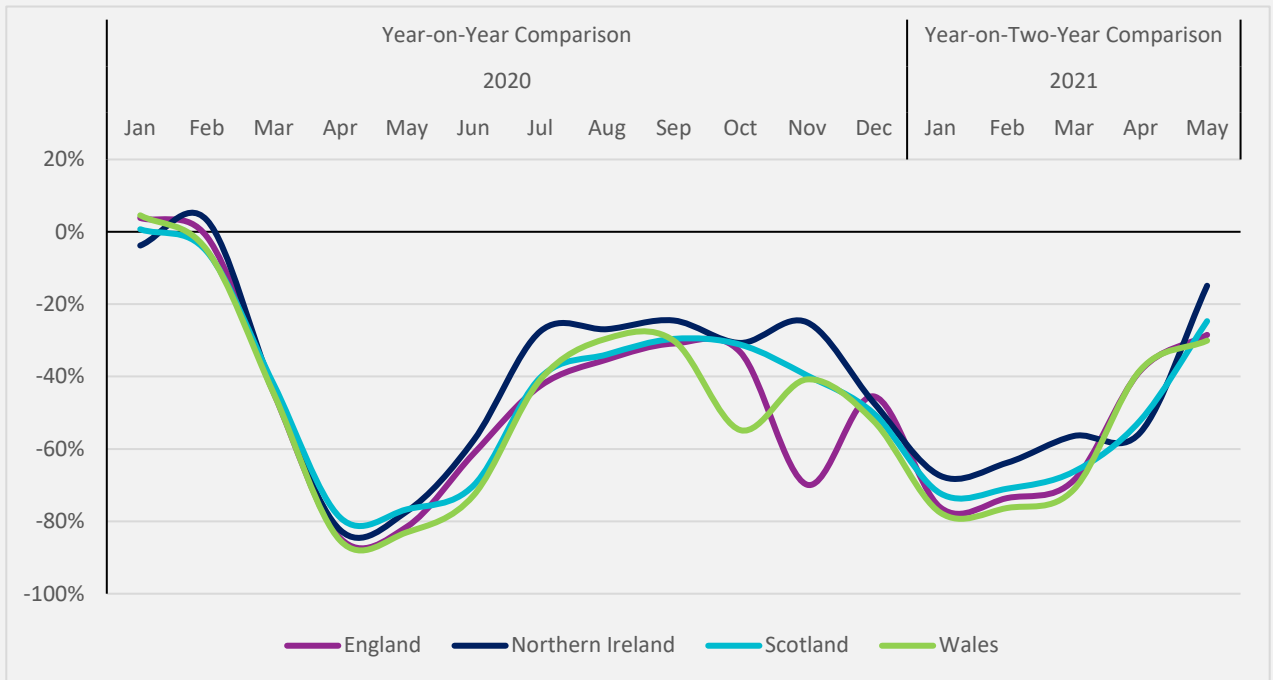
Retail Parks

-19.9%

Year on Two Year

Shopping Centres

-41.3%

Year on Two Year

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REGION FOOTFALL % CHANGE YOY AND YO2Y

APRIL FOOTFALL – UK's Nations

Northern Ireland saw the strongest recovery of all the UK's nations in May, with a decline of 14.9%. This was particularly pleasing, given it was the worst performing nation in the preceding month.

Despite outperforming the other home nations last month, Wales lagged behind the rest of the UK in May.

Scotland saw a Footfall decline of 24.7% in May, above the 28.5% decline seen in England.

Worst Performing Region

-30.4%

Wales (Yo2Y)

Best Performing Nation

-14.9%

Northern Ireland (Yo2Y)

TOTAL FOOTFALL BY REGION (% CHANGE ON 2019)

GROWTH RANK	REGION	% GROWTH Yo2Y
1	NORTHERN IRELAND	-14.9%
2	EAST MIDLANDS	-23.6%
3	EAST OF ENGLAND	-23.6%
4	NORTH WEST ENGLAND	-24.1%
5	SOUTH WEST ENGLAND	-24.4%
6	SCOTLAND	-24.7%
7	SOUTH EAST ENGLAND	-25.7%
8	WEST MIDLANDS	-28.1%
9	YORKSHIRE AND THE HUMBER	-28.1%
10	ENGLAND	-28.5%
11	NORTH EAST ENGLAND	-28.8%
12	WALES	-30.1%
13	LONDON	-37.5%

REGIONAL BREAKDOWN

Northern Ireland saw the strongest recovery in Footfall of all the regions of the UK in May, with a decline of only 14.9% from the pre-pandemic levels in 2019.

London was the worst performing of all the UK regions. The lack of tourism trade will have, no doubt, been a factor in this result, further compounded by the resistance of people to take public transport for all but the most necessary of journeys.

Best Performing Region

-14.9%
Northern Ireland

Worst Performing Region

-37.5%
London

UK FOOTFALL BY CITY
BRC - Sensormatic IQ Footfall Monitor

Sensormatic Solutions

TOTAL FOOTFALL BY CITY (% CHANGE ON 2019)

GROWTH RANK	CITY	% GROWTH Yo2Y
1	Belfast	-20.3%
2	Liverpool	-22.5%
3	Glasgow	-23.1%
4	Leeds	-24.3%
5	Cardiff	-25.2%
6	Bristol	-27.9%
7	Nottingham	-28.1%
8	Manchester	-29.1%
9	Portsmouth	-34.1%
10	Birmingham	-35.6%
11	London	-36.6%

CITY TRACKER

On a total basis, footfall across cities in the UK was, once again, significantly down on the levels seen in 2019 (pre-pandemic).

Moving from the bottom last month, to the top this month, Belfast was the strongest performing city in May.

The worst performing city was London, with a decline of 36%. This is the first time the city sat bottom of the growth ranking tables since Sep-20.

Best Performing City

-20.3%

Belfast

Worst Performing City

-36.6%

London

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.

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