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

July 2021

Period covered:
04 July – 31 July 2021

Press commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"After improvements in footfall in the early part of 2021, the situation has plateaued with little change in footfall levels for a third month in a row. The turbulent weather, with initial heatwaves giving over to torrential rain, appears to have dampened the mood for shopping in July, with a particularly pronounced fall in footfall at retail parks. However, the last week of July offered a glimmer of hope for retailers as the easing of restrictions lead to the best weekly performance of 2021. Retailers hope this trend will continue as the rise of vaccinations and falling coronavirus case numbers boosts consumer confidence.

"Government and businesses must take the opportunity to build back a better future for our local destinations. With the number of empty shopfronts still rising in many parts of the country, it is vital we rebuild our local communities to integrate leisure, retail, services, and homes. For this to be successful, Government must fulfil their commitment to alleviate the unsustainable cost burden placed on retailers by the broken rates system in their upcoming business rates review. This will allow retailers to continue to invest in their physical and digital offerings and provide communities with vibrant spaces to visit, work and shop."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"With July's wet weather dampening shoppers' spirits, High Street footfall stayed subdued as consumers remained cautious. Even the hotly debated 'Freedom Day' failed to significantly shift the dial on shopper counts, perhaps losing some of its 'shine' to the EURO's which brought forward shopping and socialising trips to earlier in the month. And in a tale of two halves, Freedom Day may have split consumer confidence, with those revelling in newfound freedoms increasing the frequency of their shopping trips, while those concerned about the relaxation of restrictions on social distancing and mask-wearing becoming more inclined to stay away.

"However, while footfall performance was flat compared to June, the trajectory in the second half of July gave cause for more cautious optimism; weekend shopper counts improved by 7 percentage points week-on-week following Freedom Day*. Retailers will now be hoping caution will give way to growing consumer confidence so that they can capitalise on summer trading."

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 footfall continues to plateau in July, showing just a small decline from the previous month, and still remains below pre-pandemic levels. Although it was the joint fifth warmest July on record for the UK, there were also heavy, thundery downpours. This, in combination with the end of the Euro football tournament and the beginning of the Olympics, may have contributed to consumers making fewer shopping trips.

Total Retail Footfall Index

Total UK Footfall decreased by 28.0% in July (Yo2Y), with a 0.4 percentage point decrease from June. This is below the 3-month average decline of 27.7%.

-28.0%
% change Year on Two Year

SHOPPING LOCATIONS:

High Street Footfall

Footfall on High Streets declined by 34.6% in July (Yo2Y), 1.2 percentage points below last month's rate and below the 3-month average decline of 34.1%.

-34.6%
% change Year on Two Year

Retail Park Footfall

Retail Parks saw footfall decrease by 15.0% (Yo2Y), 6.9 percentage points below last month's rate and below the 3-month average decline of 14.1%.

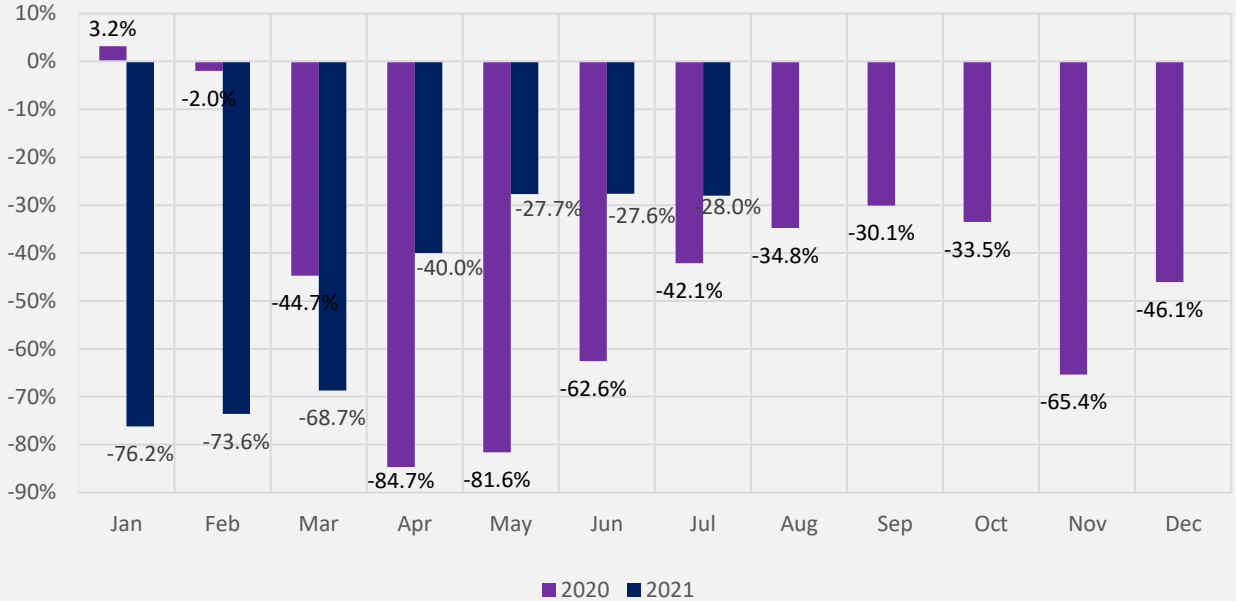# -15.0%
% change Year on Two Year

Shopping Centre Footfall

Shopping Centre footfall declined by 38.4% (Yo2Y), 2.6 percentage points below last month's rate but above the 3-month average decline of 39.1%.

-38.4%
% change Year on Two Year

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TOTAL UK RETAIL FOOTFALL (% CHANGE ON 2019)

Legend: ■ 2020 ■ 2021

Third month of standstill

The UK's footfall in July saw a modest decline compared to June. Although England saw 'Freedom Day' on the 19th July, the rest of the UK remained under some restriction.

The month's performance saw a 0.4 percentage point decline from that seen in June, but still remained well below the normal pre-pandemic levels.

July
-28.0%
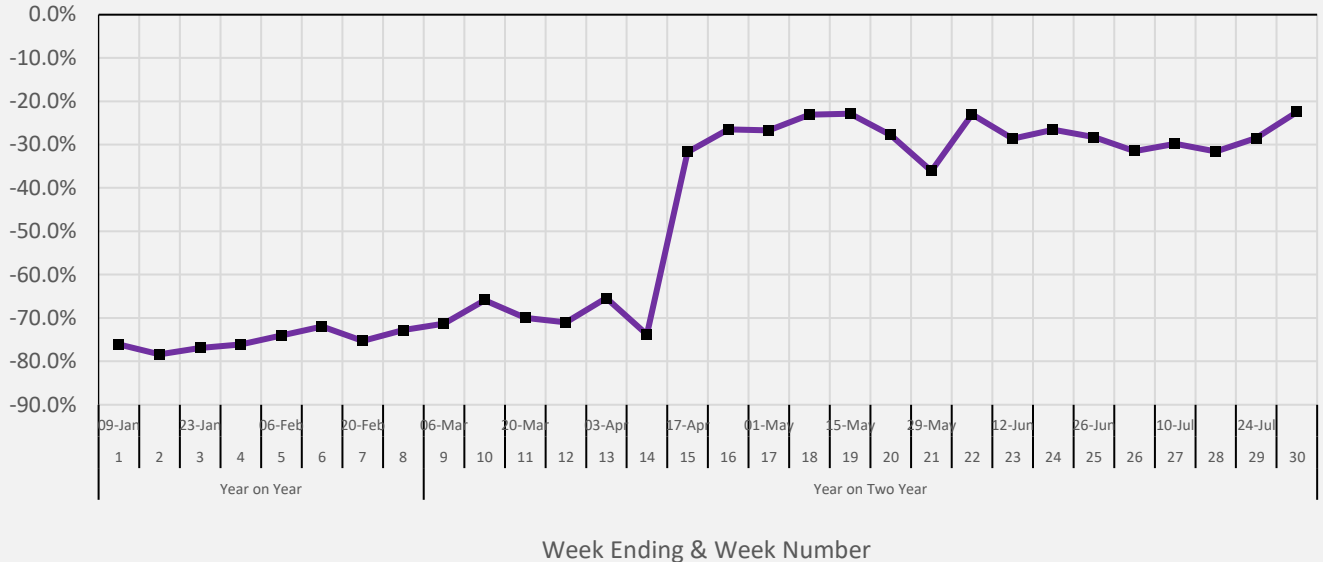Year on Two Year

12-month average
-27.0%
Year on Year

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FOOTFALL % CHANGE BY WEEK

Week Ending & Week Number

JULY UK WEEKLY FOOTFALL

Footfall in July remained above -32% throughout the month, as restrictions were lifted in England.

The steepest decline was seen in week 28 (-31.6%), whilst the shallowest decline was in week 22 (-22.5%).

Footfall levels remained broadly stable over the four weeks of the month, with the last week showing the best weekly performance of 2021.
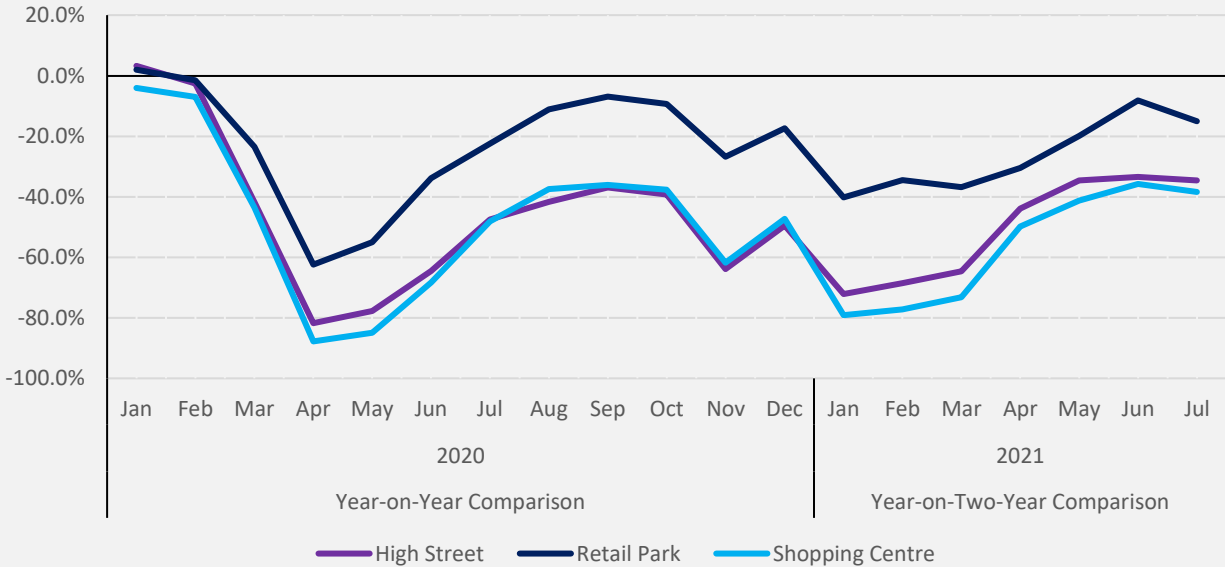
Week 30 (25 Jul – 31 July)

-22.5%

Year on Two Year

Week 28 (11 July – 17 July)

-31.6%

Year on Two Year

FOOTFALL BY LOCATION (% CHANGE ON 2019)

All locations show a gentle decline

Each retail location saw their decline in footfall drop moderately in July. In a reversal of last month, Retail Parks saw the steepest decline, with High Streets seeing the shallowest decline.

In July, Retail Parks saw a decline of 15.0 percentage points in comparison to the levels of footfall seen at the same point in 2019. This was a 6.9 percentage point fall from June.

High Street Footfall in the UK fell by 1.2 percentage points from June, to a decline of 34.6% in July.

Shopping Centres fell by 2.6 percentage points from June, to a decline of 38.4% in July.
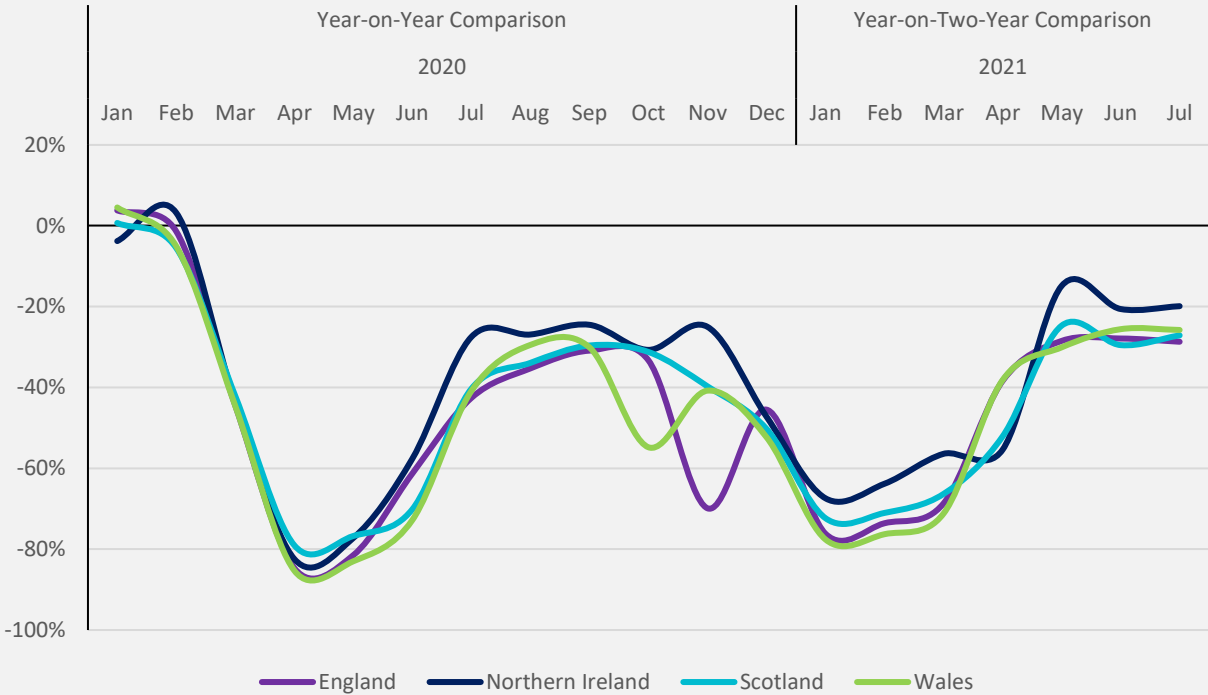
Retail Parks

-15.0%

Year on Two Year

Shopping Centres

-38.4%

Year on Two Year

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REGION FOOTFALL % CHANGE YOY AND YO2Y

Year-on-Year Comparison 2020 — Year-on-Two-Year Comparison 2021

Legend: England, Northern Ireland, Scotland, Wales

JULY FOOTFALL – UK's Nations

For the third consecutive month, Northern Ireland again saw the strongest recovery of all the UK's nations in July, with a decline of 19.9%.

Despite outperforming the other home nations last month, England lagged behind the rest of the UK in July, with a decline of 28.7%.

Wales saw a Footfall decline of 25.8% in July, above the 27.1% decline seen in Scotland.

Worst Nation

-28.7%

England (Yo2Y)

Best Performing Nation

-19.9%

Northern Ireland (Yo2Y)

UK FOOTFALL BY REGION
BRC - Sensormatic IQ Footfall Monitor

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TOTAL FOOTFALL BY REGION (% CHANGE ON 2019)

GROWTH RANK	REGION	% GROWTH Yo2Y
1	Northern Ireland	-19.9%
2	South West England	-22.7%
3	North West England	-22.8%
4	East of England	-23.9%
5	East Midlands	-24.1%
6	Wales	-25.8%
7	West Midlands	-25.8%
8	South East England	-26.6%
9	Scotland	-27.1%
10	Yorkshire and the Humber	-27.5%
11	North East England	-28.3%
12	England	-28.7%
13	London	-39.4%

REGIONAL BREAKDOWN

Northern Ireland again saw the strongest recovery in Footfall of all the regions of the UK in July, with a decline of only 19.9% from the pre-pandemic levels in 2019.

For the third consecutive month, London was the worst performing of all the UK regions. Although Freedom Day was on the 19th July, the continued lack of tourism trade will have no doubt been a factor in this result, further compounded by those concerned about the relaxation of restrictions on social distancing and mask-wearing, thus becoming more inclined to stay away.

Best Performing Region

-19.9%
Northern Ireland

Worst Performing Region

-39.4%
London

UK FOOTFALL BY CITY
BRC - Sensormatic IQ Footfall Monitor

BRC

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TOTAL FOOTFALL BY CITY (% CHANGE ON 2019)

GROWTH RANK	CITY	% GROWTH Yo2Y
1	Belfast	-20.8%
2	Cardiff	-25.7%
3	Glasgow	-26.1%
4	Bristol	-26.2%
5	Portsmouth	-26.7%
6	Leeds	-27.1%
7	Liverpool	-28.3%
8	Manchester	-28.3%
9	Nottingham	-32.5%
10	Birmingham	-37.1%
11	London	-38.8%

CITY TRACKER

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

The best performing city was Belfast, with a decline of 20.8% but has topped the monthly growth rankings table, five out of the seven months of 2021.

The worst performing city was London for the third consecutive month, with a decline of 38.8%. It was also the fifth time the city has sat at the bottom of the growth rankings table in the last twelve months.

Best Performing City
-20.8%
Belfast

Worst Performing City
-38.8%
London

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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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