



**Sensormatic
Solutions**

Comprehensive measure of
store customer traffic

Benchmark by UK nations,
location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

April 2023

Period covered:
02 April – 29 April 2023

Headline commentary



Helen Dickinson OBE | Chief Executive | British Retail Consortium

“Footfall saw year on year improvement mainly in High Streets and Shopping Centres, which had been the most affected during the pandemic, and still have the furthest to catch up. Retail footfall is finding a new balance, as the rise in online shopping and spread of hybrid working, has changed consumer shopping habits. As a result, while we expect footfall to continue to improve, it may never reach the levels seen prior to the pandemic.

“There is good cause for optimism in the coming month, as the Coronation is expected to bring a surge in footfall over the bank holiday, as shoppers head out to the shops ahead of this historic event. Government should capitalise on the uptick in global tourism, finding ways to boost the UK’s position as a top destination for international shoppers. The UK now stands alone as the only major European economy without a VAT-free shopping scheme, dissuading many potential shoppers from visiting.”



Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

“Footfall saw growth again in April, even if more modest than in the first quarter. This is despite a continuing cost of living crisis and inflation in most categories, not least food. With April marking a year on from the end of the last remaining covid restrictions across the UK, as well as the first energy price cap increase, remarkably, retailers are starting to see some stability.

"This can partially be attributed to consumers adjusting to the times by shopping down or shopping more carefully. As we became used to “living with covid”, consumers have now lived with higher prices for over a year, meaning shopping habits are beginning to stabilise. Stability brings predictability and predictability brings retailers the confidence to plan. There is also positive news from some retailers, with HMV making a much-anticipated return to Oxford Street after a four-year hiatus, and M&S announcing it is investing £12.5 million into developing its London store portfolio this year.

"The outlook does remain tough however, and double-digit growth was always going to fizzle out as the year went on and footfall trends began to normalise. Nevertheless, rising consumer confidence and a May full of holidays is surely something that retailers can look forward to.”

Note: As footfall has now stabilised, albeit remaining lower than pre-pandemic levels, we are now reporting year-on-year (YoY) comparisons only.

Executive Summary

The retail industry saw a significant increase in foot traffic in January, but the growth rate decreased in subsequent months, with the lowest growth rate recorded in April. However, there was still a positive trend in footfall, with monthly growth rates remaining above 5%, suggesting that consumer behaviour is gradually returning to physical retail locations and there is an ongoing recovery in the retail industry, albeit at a slower pace than earlier in the year.

▲ Total Retail Footfall Index

- Improved by +5.3% points compared to April last year
- Worsened by -1.5% points compared to last month
- Below the 3-mth average improvement of +7.0%

+5.3%

% change YoY

BY SHOPPING LOCATION:

▲ High Street Footfall:

- Improved by +10.5% points compared to April last year
- Improved by +1.9% points compared to last month
- Below the 3-mth average improvement of +13.4%

+10.5%

% change YoY

▼ Retail Park Footfall:

- Worsened by -6.9% points compared to April last year
- Worsened by 1.0% points compared to last month
- Below the 3-month average decline of -5.6%

-6.9%

% change YoY

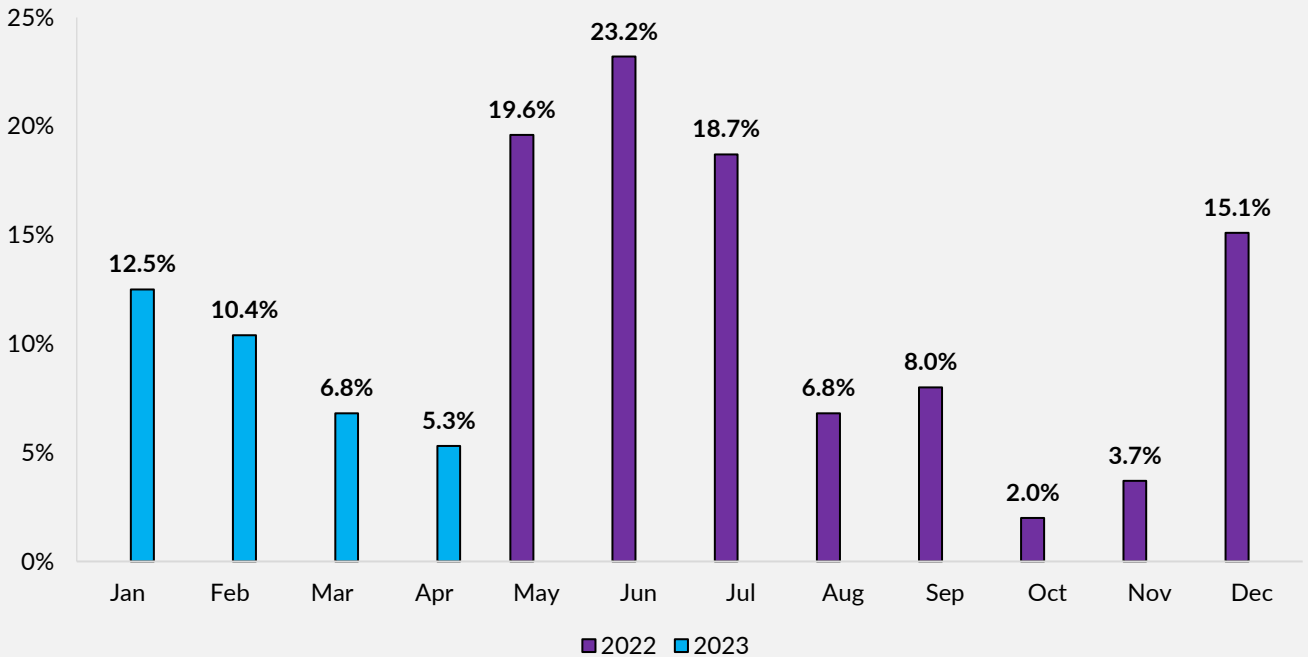
▲ Shopping Centre Footfall

- Improved by +7.9% points compared to April last year
- Worsened by -0.3% points compared to last month
- Below the 3-month average improvement of +9.1%.

+7.9%

% change YoY

TOTAL UK FOOTFALL % CHANGE (Year-On-Year)



Shopper numbers up in April

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.

- In April, there was a 1.5% decrease in footfall in the UK compared to March.
- Footfall has improved year-on-year, indicating a recovery in the retail industry after the pandemic. However, online shopping and hybrid working have changed consumer habits, resulting in a new balance for retail footfall.
- The stabilisation of shopping habits due to consumers adjusting to the pandemic means that while footfall is expected to continue improving, it may never reach pre-pandemic levels. The retail industry is showing positive signs, with some retailers investing in store development and returning to high streets.

April 2023

+5.3%

Year-on-Year

12-month average

+11.5%

Year-on-Year

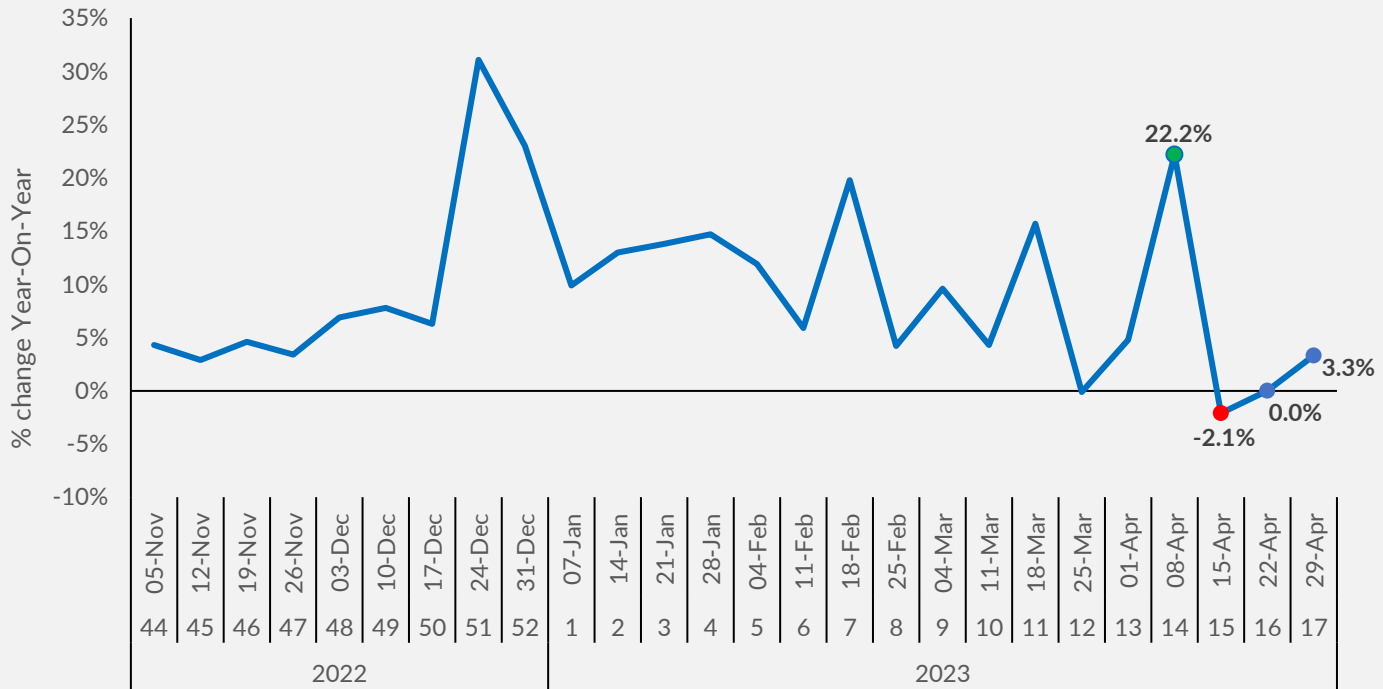
TOTAL FOOTFALL – BY WEEK

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WEEKLY TOTAL RETAIL FOOTFALL (% CHANGE YoY)



APRIL 2023 UK WEEKLY FOOTFALL

- Footfall is higher for two out of the four weeks compared to the equivalent weeks in April 2022.
- The first week saw a significant increase in footfall and was the third best weekly performance seen in the last 6 months.
- The second week has the lowest weekly performance seen in the last 6 months. However, it is worth noting that the second week was affected by the Easter holidays, which would have impacted footfall trends.
- Overall, the data suggests that footfall in retail is experiencing a degree of fluctuation, but the trend is generally positive.

1st Week of Apr-23 (02 - 08 Apr)

+22.2%

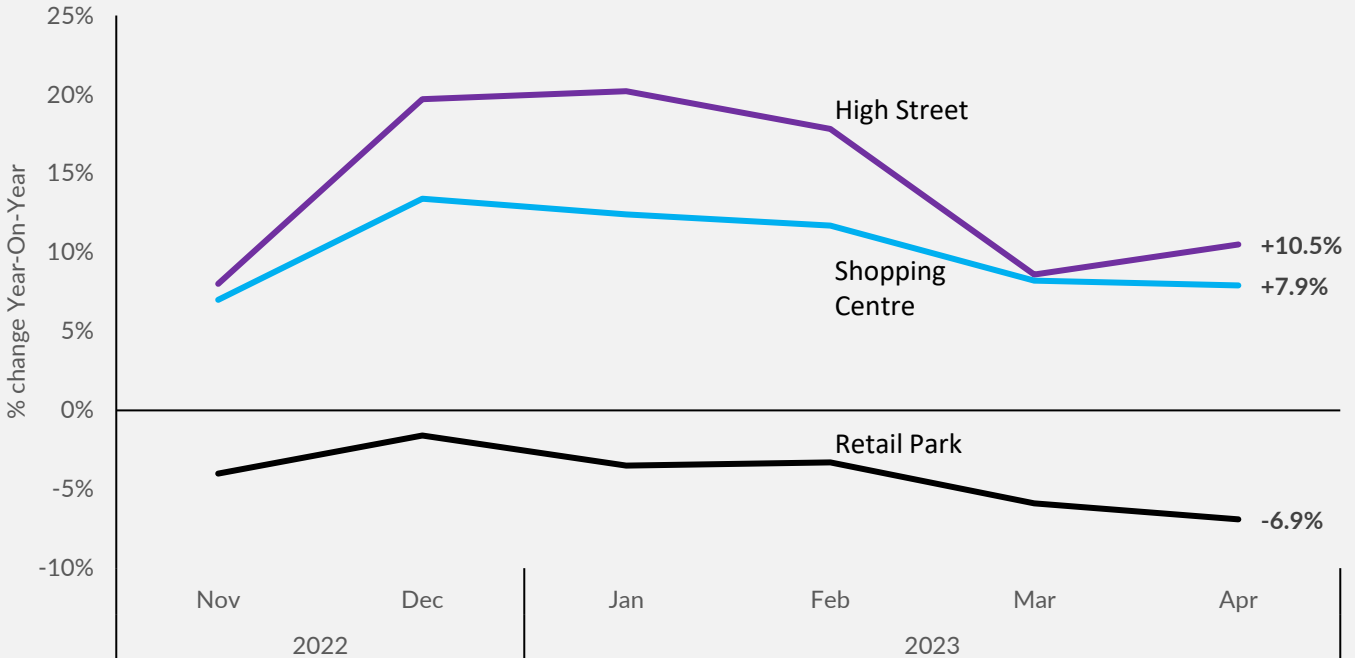
Year-on-Year

2nd Week of Apr-23 (09 - 15 Apr)

-2.1%

Year-on-Year

FOOTFALL BY LOCATION (% CHANGE YoY)



High Streets continue to lead retail recovery

YoY: All UK retail footfall was up 5.3% on average

- **High Streets**
 - ↑+10.5% compared to Apr 2022
 - 3 month avg YoY ↑+13.4%
 - 6 month avg YoY ↑+19.9%
- **Shopping Centres**
 - ↑+7.9% compared to April 2022
 - 3 month avg YoY ↑+9.1%
 - 6 month avg YoY ↑+10.6%
- **Retail Parks**
 - ↓-6.9% compared to April 2022
 - 3 month avg YoY ↓-5.6%
 - 6 month avg YoY ↓-1.4%

2023 thus far:

- High Streets have seen the highest increase in foot traffic, with the largest growth occurring in January and February
- Shopping Centres also experienced an increase in footfall, but not as significant as High Streets
- Retail Parks, on the other hand, saw a decline in footfall in all four months
- Overall, the data suggests that consumer behaviour is changing, and people are gradually returning to physical retail locations, particularly in urban areas

High Streets

+10.5%

Year-on-Year

Shopping Centres

+7.9%

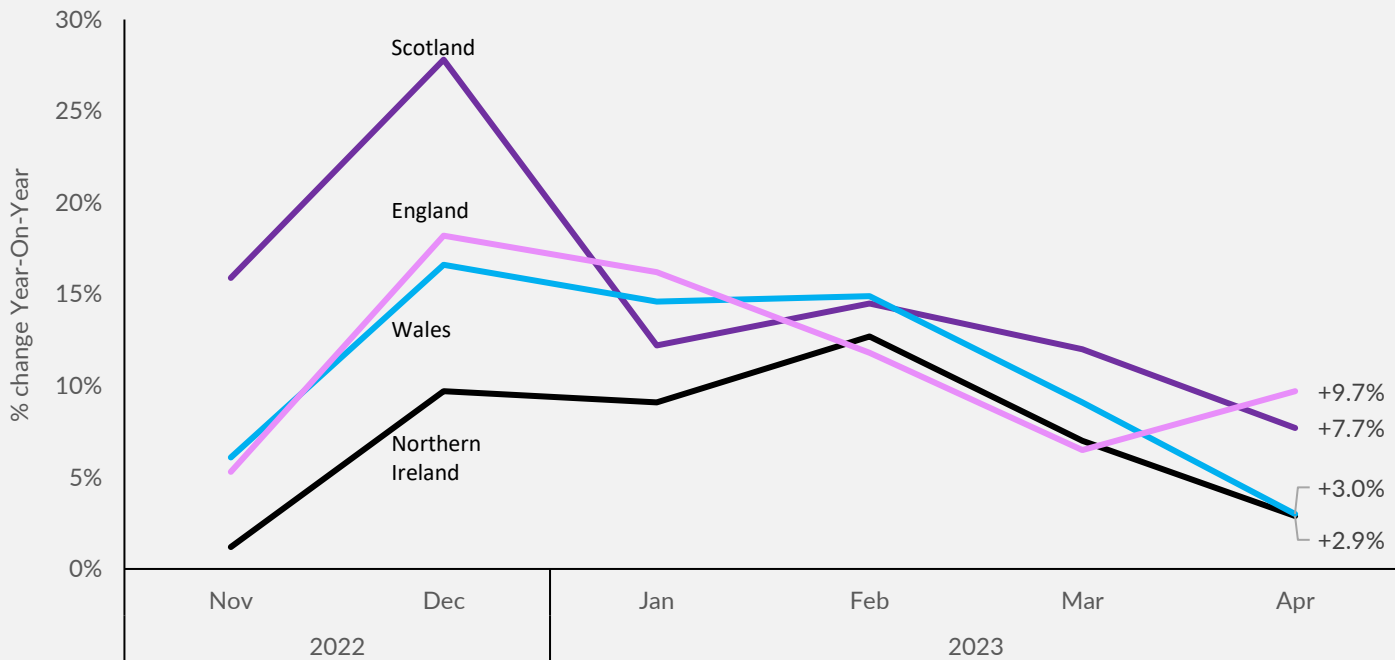
Year-on-Year

Retail Parks

-6.9%

Year-on-Year

NATIONAL FOOTFALL (% CHANGE YoY)



UK Nations

vs 2022

England Footfall:

- Strongest recovery of all the UK's nations
- ↑ +9.7% compared to last year
- ↑ growth rate compared to March
- Prior to April, England last showed the strongest national recovery in Jan 2023

+9.7%

Scotland Footfall:

- ↑ +7.7% compared to last year
- ↓ growth rate compared to March
- Slowest Scotland monthly recovery seen in the last 6 months

+7.7%

Wales Footfall:

- ↑ +3.0% compared to last year
- ↓ growth rate compared to March
- Slowest Wales monthly recovery seen in the last 6 months

+3.0%

Northern Ireland Footfall:

- Strongest recovery of all the UK's nations
- ↑ +2.9% compared to last year
- ↓ growth rate compared to March
- Prior to April, NI last showed the weakest national recovery in Jan 2023

+2.9%

UK FOOTFALL BY ENGLISH REGION

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TOTAL FOOTFALL BY REGION (% CHANGE YoY)

CURRENT RANK	RANK CHANGE	REGION	% GROWTH YoY
1	▲ +1	London	+10.0%
2	▲ +3	West Midlands	+6.0%
2	▲ +6	East Midlands	+6.0%
3	▼ -2	East of England	+5.3%
3	▲ +1	South East England	+5.3%
6	▲ +1	Yorkshire and the Humber	+2.9%
7	▼ -1	North West England	+2.8%
8	▼ -5	South West England	+1.8%
9	↔	North East England	-3.2%

ENGLAND REGIONAL BREAKDOWN

- **London** saw the **strongest footfall** performance in April
- **↑ +10.0 %** compared to last year
- **East Midlands** saw the **highest ascent** up the ranking table in April
- **Up 6 spots**, from position 8 to 2
- **South West England** saw the **biggest ranking drop** in April
- **Down 5 spots**, from position 3 to 8
- **North East England** was again the **worst-performing** region in April for the third consecutive month
- **↓ -3.2%** compared to last year

Best Performing Region

+10.0%

London

Worst Performing Region

-3.2%

North East England

TOTAL FOOTFALL BY CITY (% CHANGE YoY)

CURRENT RANK	RANK CHANGE	CITY	% GROWTH YoY
1	▲ +2	London	+10.0%
2	▼ -1	*Edinburgh	+9.8%
3	▲ +2	Nottingham	+8.8%
4	▲ +7	Birmingham	+6.4%
5	▲ +3	Liverpool	+6.2%
6	↔	Manchester	+4.5%
7	▼ -5	Glasgow	+3.3%
8	▲ +1	Bristol	+3.0%
9	▼ -5	Cardiff	+2.8%
10	▼ -3	Belfast	+1.6%
11	▼ -1	Leeds	+0.9%

*Edinburgh data has been revised following Apr-23 Press Release due to miscellaneous data from last year. This has resulted in a lower percentage growth than initially recorded.

CITY TRACKER

Major Cities:

- April average **up** compared to April last year
- April average **↓** -0.3% compared to March
- Lowest average improvement seen since Nov 2022

Best Performing City:

- **London**
- **↑** +10.0% compared to April last year
- **↑** +2.2% compared to March

Best Performing City

+10.0%

London

Worst Performing City:

- **Leeds**
- **↑** +0.9% compared to April last year
- **↓** -2.5% compared to March
- Prior to April, Leeds was the worst-performing city in Aug 2022

Worst Performing City

+0.9%

Leeds

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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