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**Sensormatic
Solutions**

Comprehensive measure of
store customer traffic

Benchmark by UK nations,
location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

December 2022

Period covered:
27 November – 31 December 2022

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"Footfall reached its highest level since the start of the pandemic in December. A combination of rail disruption and the cold snap kept many shoppers from visiting town centres and high streets in the last week before Christmas. Meanwhile, the postal strikes forced others to head in for the last week to secure last minute gifts in-store.

"Historically low consumer confidence and 30-year-high inflation made for an exceptionally difficult year for consumers and retailers, with footfall down over 10% on pre-pandemic levels. Nonetheless, this was still a significant improvement on the previous two years when the pandemic kept many people at home. Although retailers' input costs show little sign of easing in 2023, they continue to do all they can to keep prices affordable and tempt customers in."

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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"Physical retail rallied in December, with store performance last month posting its best footfall counts compared to pre-pandemic figures all year. Retailers rose above an onslaught of festive disruption, from snow chaos to rail and mail strikes impacting consumers' shopping journeys both on- and off-line, disrupting pre-Christmas travel to shopping hubs and creating online delivery backlogs and delays. And, once again, it was the in-store teams that kept retailers' doors open and able to continue to serve their customers and communities. Looking ahead to 2023, retailers will be hoping for more stability and support to help them chart a trading course for success in the light of continued economic headwinds, as they adapt their retail offers to the needs of the cost-of-living consumer."

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

December saw an encouraging improvement to total UK footfall, boosted by the Christmas holidays and Boxing Day sales. Although, it was 7.3% lower when compared to the same month in 2019, this still represents the highest recovery point seen since February 2020.

Total Retail Footfall Index

Total UK footfall decreased by 7.3% in December (Yo3Y), 6.0 percentage points better than November. This is better than the 3-month average decline of 10.2%.

-7.3%
% change vs 2019
[+15.1% compared to December 2021]

BY SHOPPING LOCATION:

High Street Footfall

High Streets footfall declined by 9.3% in December (Yo3Y), 4.3 percentage points better than last month's rate and better than the 3-month average decline of 11.0%.

-9.3%
% change vs 2019
[+19.7% compared to December 2021]

Retail Park Footfall

Retail Parks saw footfall decrease by 5.2% (Yo3Y), 1.0 percentage points worse than last month's rate and worse than the 3-month average decline of 4.5%.

-5.2%
% change vs 2019
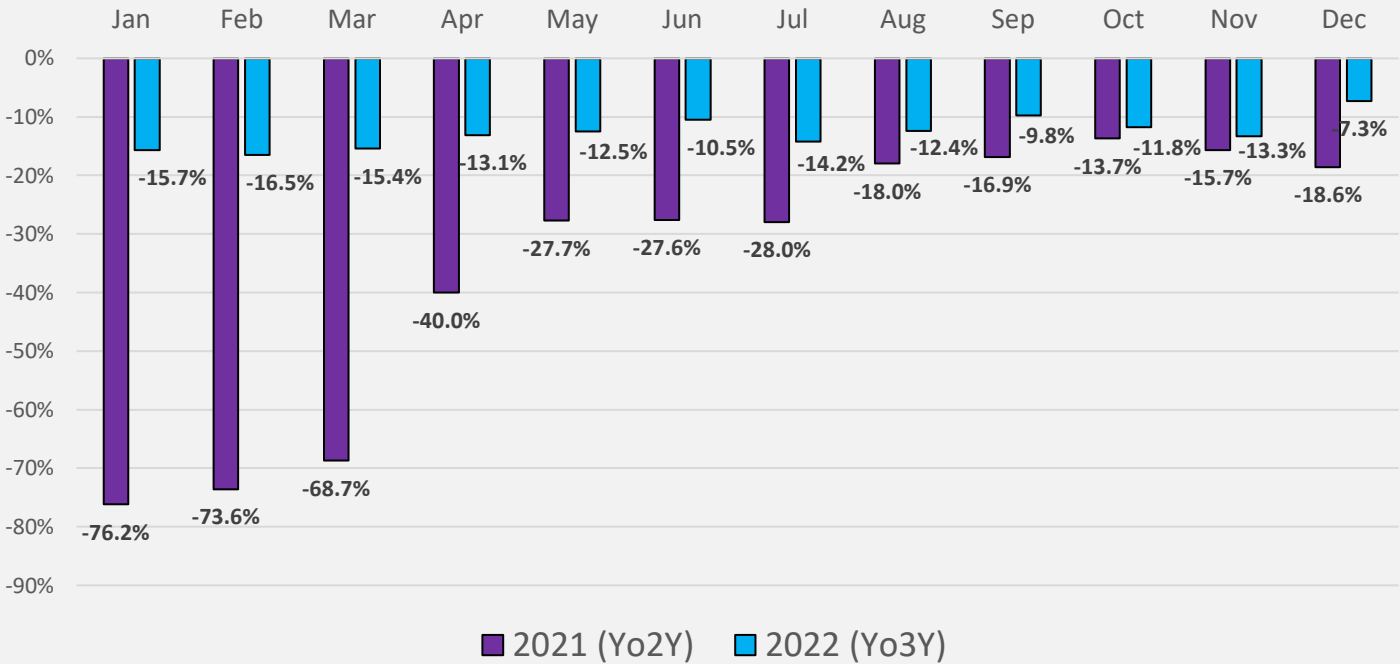[-1.6% compared to December 2021]

Shopping Centre Footfall

Shopping Centre footfall declined by 19.9% (Yo3Y), 3.3 percentage points better than last month's rate and below the 3-month average decline of 20.9%.

-19.9%
% change vs 2019
[+13.4% compared to December 2021]

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TOTAL UK FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS)

Month	2021 (Yo2Y)	2022 (Yo3Y)
Jan	-76.2%	-15.7%
Feb	-73.6%	-16.5%
Mar	-68.7%	-15.4%
Apr	-40.0%	-13.1%
May	-27.7%	-12.5%
Jun	-27.6%	-10.5%
Jul	-28.0%	-14.2%
Aug	-18.0%	-12.4%
Sep	-16.9%	-9.8%
Oct	-13.7%	-11.8%
Nov	-15.7%	-13.3%
Dec	-18.6%	-7.3%

■ 2021 (Yo2Y) ■ 2022 (Yo3Y)

Footfall rises in preparation for Christmas

UK Footfall took a step in the right direction in December, boosted in part by Christmas shopping and Boxing Day sales. This marks the highest recovery point since the onset of the pandemic.

Compared to the previous month, December's performance improved, with a 6-percentage point rise, but remaining below the normal pre-pandemic levels.

December

-7.3%

Year-on-Three-Year

[+15.1% compared to 2021]

12-month average
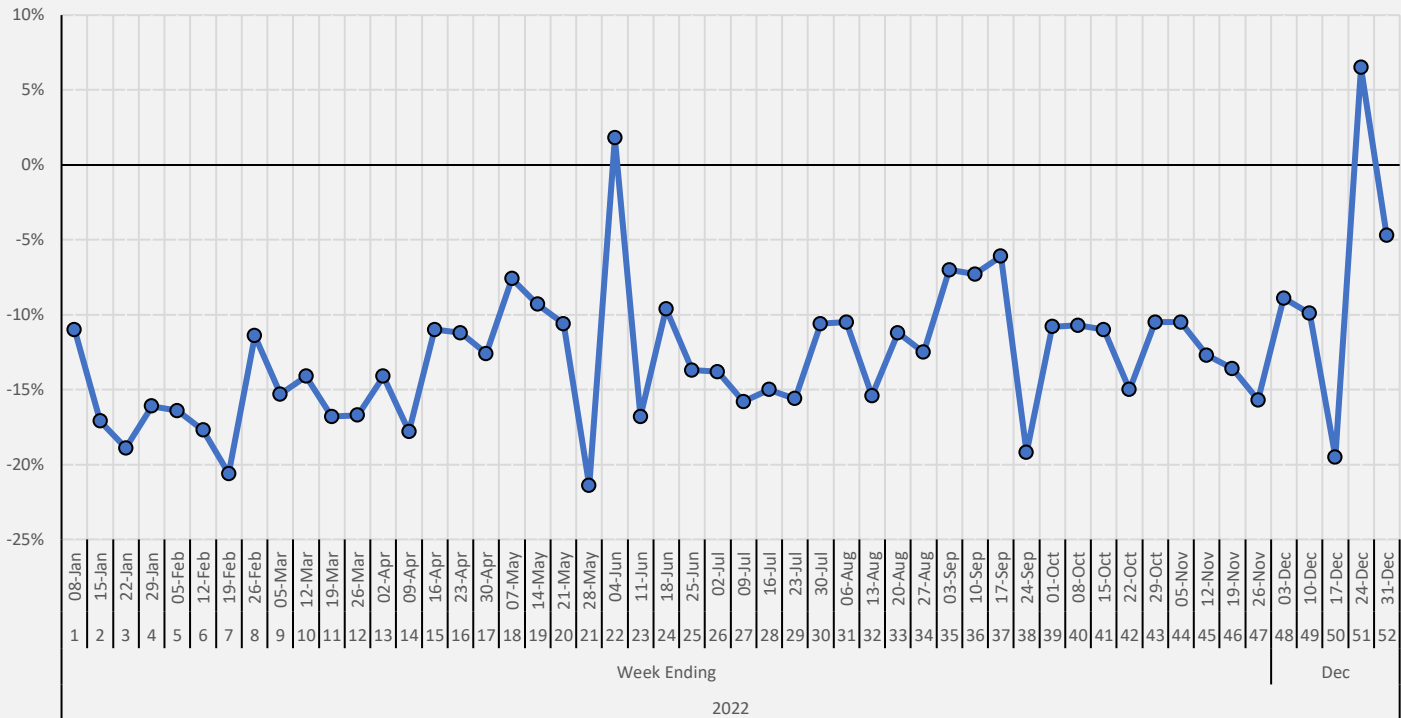
-11.8%

Year-on-Three-Year

[+32.7% compared to 2021]

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WEEKLY TOTAL RETAIL FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS, Yo3Y)

Week Ending

2022

Dec

DECEMBER UK WEEKLY FOOTFALL

When comparing Dec 2022 weekly data against Dec 2019, footfall is comparatively low for four out of the five weeks of 2022. However, the percentage difference between the 2 years never falls below -20%.

The fourth week of Dec shows the strongest percentage difference compared to 2019, at +6.5%.

Christmas shopping would have contributed to the strongest incline of 6.5% seen in the fourth week of Dec 2022 when compared to the last week of Dec 2019.

Week 51 (18 – 24 Dec)

+6.5%

Year-on-Three-Year
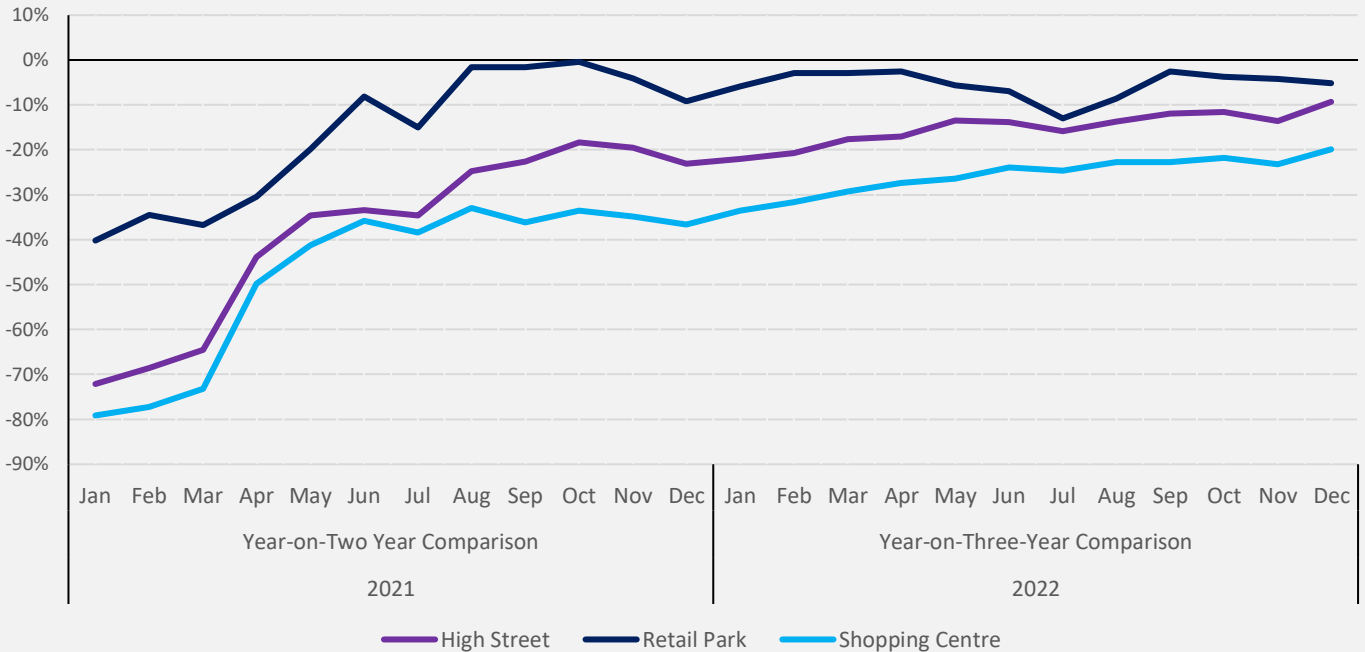**[+31.1%** compared to 4th wk of Dec 2021]

Week 50 (11 – 17 Dec)

-19.5%

Year-on-Three-Year
[+6.3% compared to 3rd week of Dec 2021]

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

Year-on-Two Year Comparison — 2021

Year-on-Three-Year Comparison — 2022

High Street · Retail Park · Shopping Centre

Retail Park recovery continues to remain ahead of other locations

Compared to pre-pandemic, December 2019

All retail footfall was down 7.3% on average.

Retail Parks saw a decline of 5.2%. This compares to the 3 month and 6 month averages of –4.5% and -6.2%, respectively.

High Streets saw a decline of 9.3%. This compares to the 3 month and 6 month averages of –11.0% and –12.7%, respectively.

Shopping Centres saw a decline of 19.9%. This compares to the 3 month and 6 month averages of -20.9% and –22.5%, respectively.

Compared to last year, Dec 2021

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

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

Retail Parks
-5.2%
Year-on-Three-Year
[**-1.6%** compared to December 2021]

High Streets
-9.3%
Year-on-Three-Year
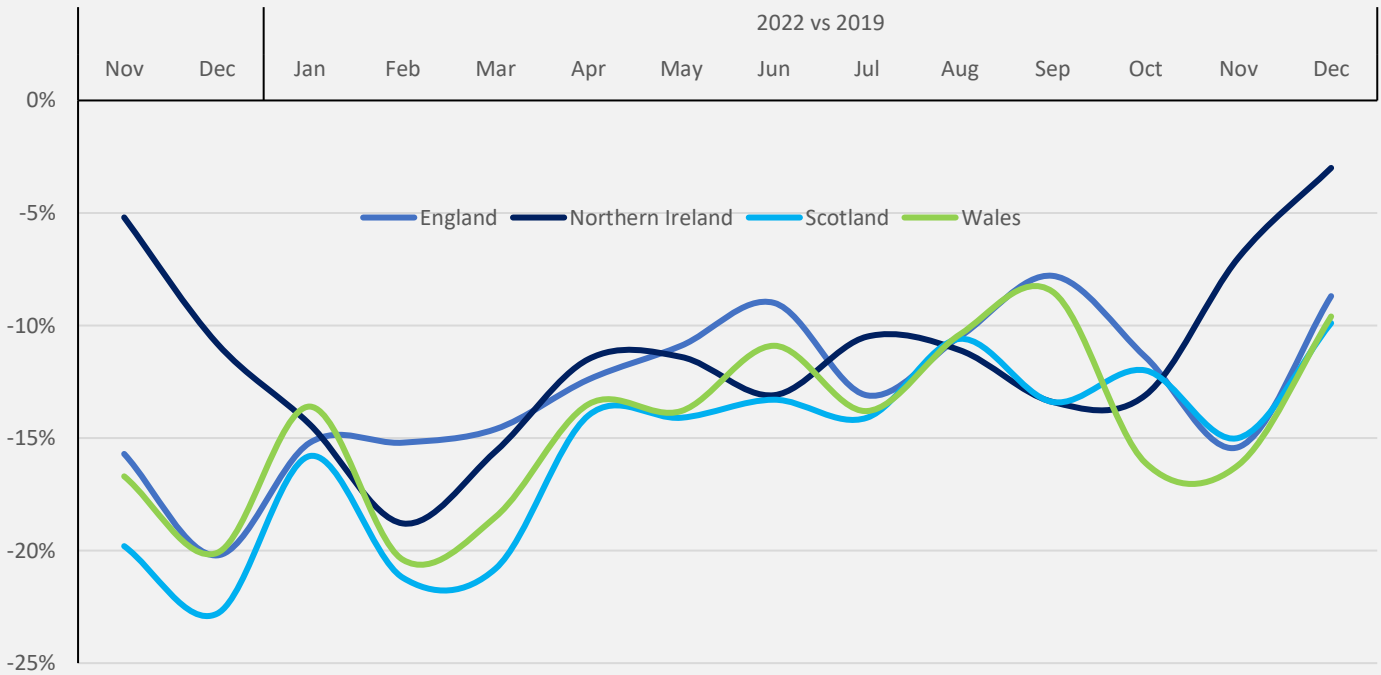[**+19.7%** compared to December 2021]

Shopping Centres
-19.9%
Year-on-Three-Year
[**+13.4%** compared to December 2021]

NATIONAL FOOTFALL (% CHANGE ON PRE-PANDEMIC LEVELS)

2022 vs 2019

Legend: England — Northern Ireland — Scotland — Wales

UK Nations

vs. 2019

Northern Ireland saw the strongest recovery of all the UK's nations, with a decline of 3.0% vs pre-pandemic, but is up 9.7% vs 2021.

-3.0%

Scotland saw a decline of 9.9% vs pre-pandemic, but is up 27.8% vs 2021.

-9.9%

England saw a footfall decline of 8.7% vs pre-pandemic, but is up by 18.2% vs. 2021.

-8.7%

Wales saw a footfall decline of 9.6%. However, Wales saw an increase of 16.6% vs. 2021.

-9.6%

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	-4.6%
2	-	Yorkshire and the Humber	-5.6%
3	↑ +1	South West England	-7.5%
4	↓ -1	West Midlands	-8.2%
5	↑ +4	North East England	-8.2%
6	-	South East England	-10.7%
7	-	East of England	-11.3%
8	-	East Midlands	-12.3%
9	↓ -4	London	-13.8%

ENGLISH REGIONAL BREAKDOWN

The North West again saw the strongest recovery in footfall in December, with a decline of 4.6 %. This means, with regards to recovery, it has topped the monthly English regional table 10 times in 2022.

The North East saw the highest ascent up the ranking table, from position 9 to 5.

London saw the biggest ranking drop, from position 5 to 9 and was the worst performing region.

Best Performing Region(s)

-4.6%

North West England (Yo3Y)

[+16.6% compared to November 2021]

Worst Performing Region

-13.8%

London (Yo3Y)

[+23.9% compared to December 2021]

UK FOOTFALL BY CITY
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TOTAL FOOTFALL BY CITY (% CHANGE Yo3Y)

CURRENT RANK	RANK CHANGE	CITY	% GROWTH Yo3Y
1	-	Belfast	9.3%
2	-	Manchester	2.6%
3	-	Liverpool	-1.8%
4	-	Edinburgh	-5.1%
5	+1	↑ Cardiff	-5.2%
6	+1	↑ Glasgow	-7.9%
7	+1	↑ Leeds	-9.3%
8	+1	↑ Birmingham	-10.2%
9	+1	↑ Nottingham	-11.0%
10	+1	↑ Bristol	-11.4%
11	-5	↓ London	-12.3%

CITY TRACKER

All major UK cities reflected the national picture with footfall down 5.7% vs 2019, with an improvement of 6.1% when compared to last month. Although significant variation was seen, cities, showed an improvement of 16% 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 over the Christmas period.

For the second month in a row, the best-performing city was Belfast, with an increase of 9.3% compared to 2019 and an improvement of 3.6% compared to last month.

For the first time since January 2022 the worst-performing city was London, with a decline of 12.3% compared to 2019 but an increase of 1.5% compared to last month.

Best Performing City
+9.3%
Belfast (Yo3Y)
[+8.7% compared to December 2021]

Worst Performing City
-12.3%
London (Yo3Y)
[+21.0% compared to December 2021]

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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.

AUTHOR

ASIM DEY
Insight Executive

EDITOR

DR KRIS HAMER
Director of Insight

BRC MEMBER ENQUIRIES

Please email: insight@brc.org.uk

MEDIA ENQUIRIES

BRC Press Office
Tom Holder
T: +44 (0)20 7854 8924
M: +44 (0)7772 382 432
tom.holder@brc.org.uk / media@brc.org.uk

Sensormatic Solutions Press Office
Katarzyna Breczko
Marketing Director EMEA Retail
T: +49 173 7070 562
katarzyna.breczko@jci.com