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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

September 2021

Period covered:
29 August – 02 October 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

“While footfall at the start of September was strong, it slowed over the course of the month as increasing rainfall and ongoing fuel and supply issues convinced some consumers to stay home. The final week of September saw the worst total footfall levels since the last week of July this year, shortly after the last Covid restrictions were lifted, demonstrating the fragility of consumer confidence and how the economic recovery from Covid can be so easily undermined. Retail parks continue to perform better than other shopping destinations, with access to larger stores, parking, and petrol stations.

“As we approach Christmas, it is imperative Government takes further action to resolve the driver shortage which is increasing costs and creating delays throughout the supply chain. Retailers are trying to recruit and train thousands of new British drivers, but 5,000 visas are not enough to fill the gap in the short term. The Government should extend the visa scheme to help prevent customers facing significant disruption this Christmas.”



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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

“We saw a slight slowdown in September’s footfall recovery, which was particularly marked in the second half of the month as fears of fuel shortages prompted consumers to limit shopping journeys to essential trips. However, while we saw a levelling off in shopper traffic counts last month, September still represented the highest recovery point compared to pre-pandemic levels yet this year, pointing to a steady, albeit marginal, upward trajectory even in spite of supply chain disruption and petrol shortages at the pumps. And, the UK’s footfall recovery is far from tanking when we look across to our European counterparts – while shopper traffic in the UK is down 17% on pre-pandemic levels, the likes of France and Germany are still seeing footfall down by over a third.

“Looking ahead, retailers will be counting on the Golden Quarter to capitalise on Christmas trade as the High Street’s recovery continues – and with our research showing 79% of consumers will start festive shopping between now and the start of December, October and November will be critical months to encourage shoppers back into store.”

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 softened at a slower pace in September compared to the previous month. However, while we saw a levelling off in shopper traffic counts, September still represented the highest recovery point compared to pre-pandemic levels yet this year.

Total Retail Footfall Index

Total UK Footfall decreased by 16.8% in September (Yo2Y), with a 1.2 percentage point increase from August. This is above the 3-month average decline of 20.5%.

-16.8%

% change Year on Two Year

SHOPPING LOCATIONS:

High Street Footfall

Footfall on High Streets declined by 22.6% in September (Yo2Y), 2.2 percentage points above last month's rate and above the 3-month average decline of 26.9%.

-22.6%

% change Year on Two Year

Retail Park Footfall

Retail Parks saw footfall decrease by 1.6% (Yo2Y), no change from last month's rate and above the 3-month average decline of 9.1%.

-1.6%

% change Year on Two Year

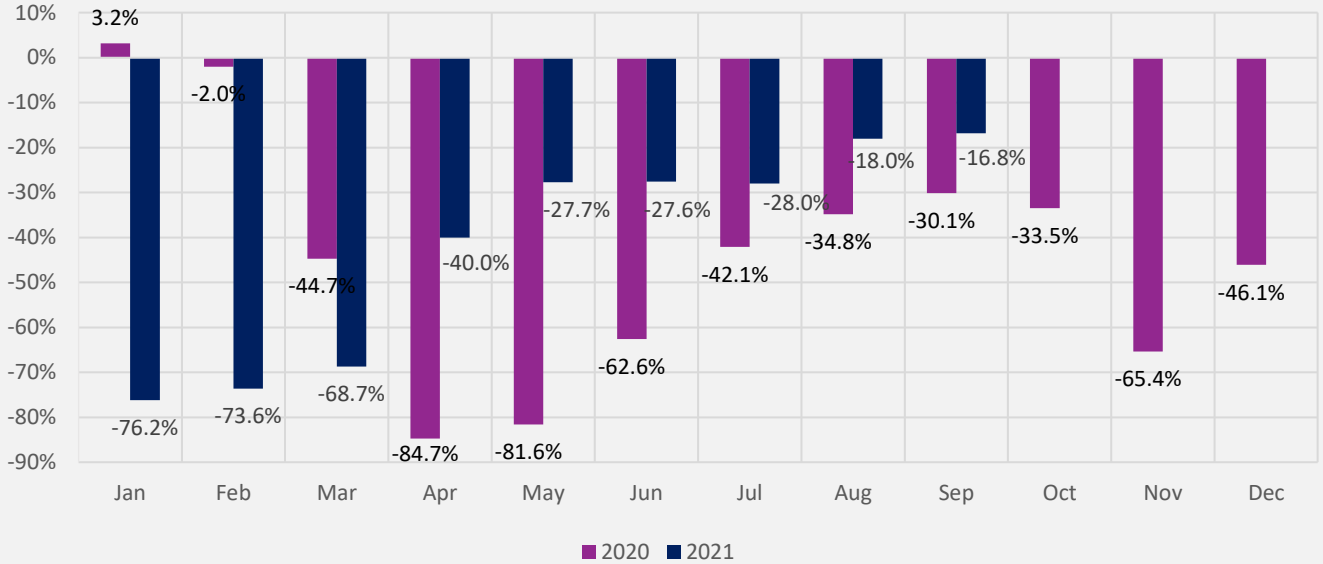
Shopping Centre Footfall

Shopping Centre footfall declined by 35.6% (Yo2Y), 2.7 percentage points below last month's rate and below the 3-month average decline of 35.1%.

-35.6%

% change Year on Two Year

TOTAL UK RETAIL FOOTFALL (% CHANGE ON 2019)



Footfall recovery stalls in wet weather

Although the UK's footfall in September saw only a modest improvement compared to August, it was the lowest year-on-two-year decline seen this year.

The month's performance saw a 1.2 percentage point improvement from that seen in August, but still remained well below the normal pre-pandemic levels.

September

-16.8%

Year on Two Year

12-month average

-17.5%

Year on Year

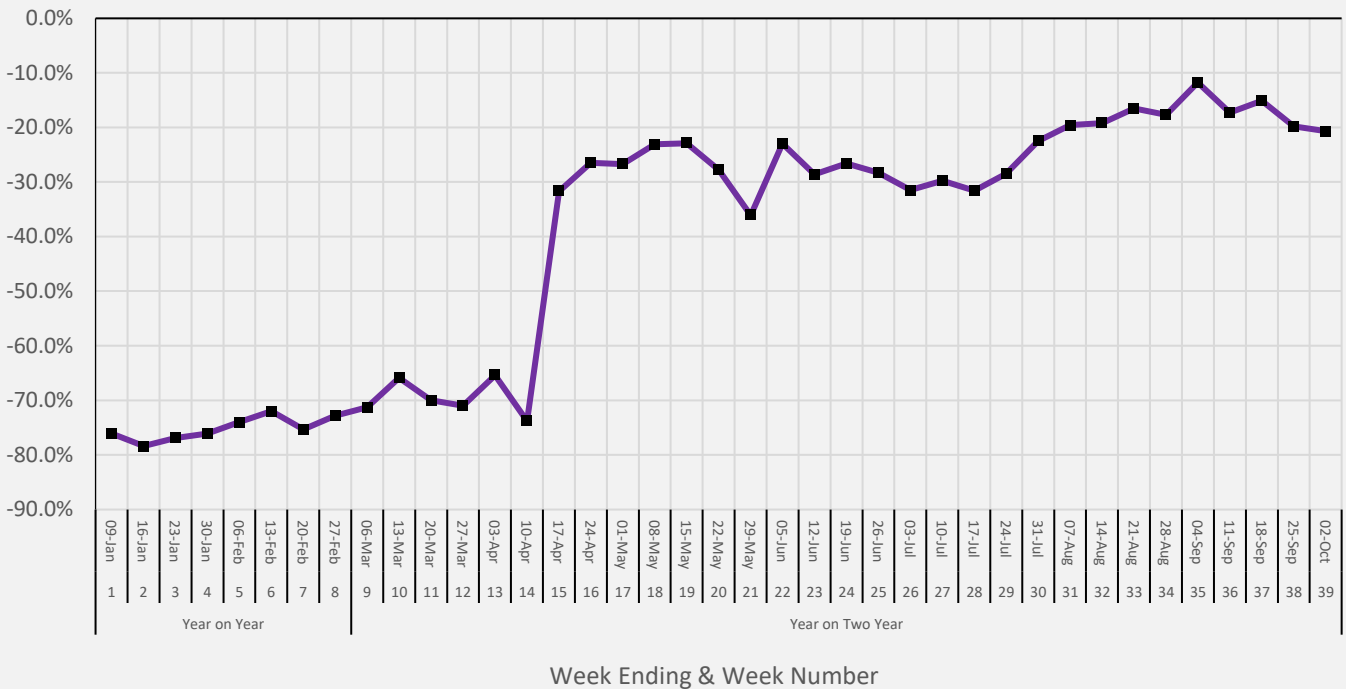
TOTAL FOOTFALL – BY WEEK

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FOOTFALL % CHANGE BY WEEK



SEPTEMBER UK WEEKLY FOOTFALL

Footfall in September remained above -21% throughout the month as legal restrictions remain lifted and more people continue to be vaccinated.

The steepest decline was seen in week 39 (-20.7%), whilst the shallowest decline was in week 35 (-11.8%).

Footfall levels remained broadly stable over the four weeks of the month, with the first week showing the best weekly performance of September and of 2021.

Week 35 (01 Sep – 07 Sep)

-11.8%

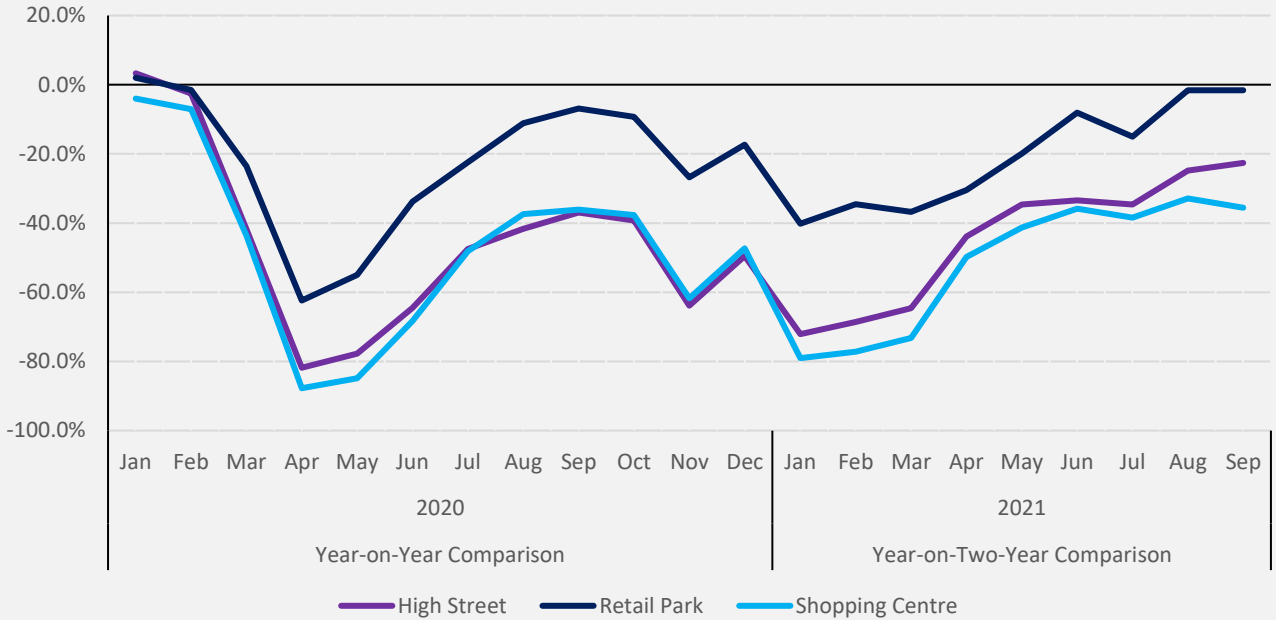
Year on Two Year

Week 39 (29 Aug – 05 Oct)

-20.7%

Year on Two Year

FOOTFALL BY LOCATION (% CHANGE ON 2019)



Shopping centres see steepest decline of all locations for the ninth consecutive month

Although each location last month saw an increase in footfall to varying degrees, in September - High Streets saw a slight increase compared to August, Retail Parks decline remained unchanged and Shopping Centres saw a slight fall from August.

In September, Retail Parks again saw a decline of 1.6 percentage points in comparison to the levels of footfall seen at the same point in 2019, unchanged from August.

High Street Footfall in the UK increased by 2.2 percentage points from August, to a decline of 22.6% in September.

Shopping Centres decreased by 2.7 percentage points from August, to a decline of 35.6% in September.

Retail Parks

-1.6%

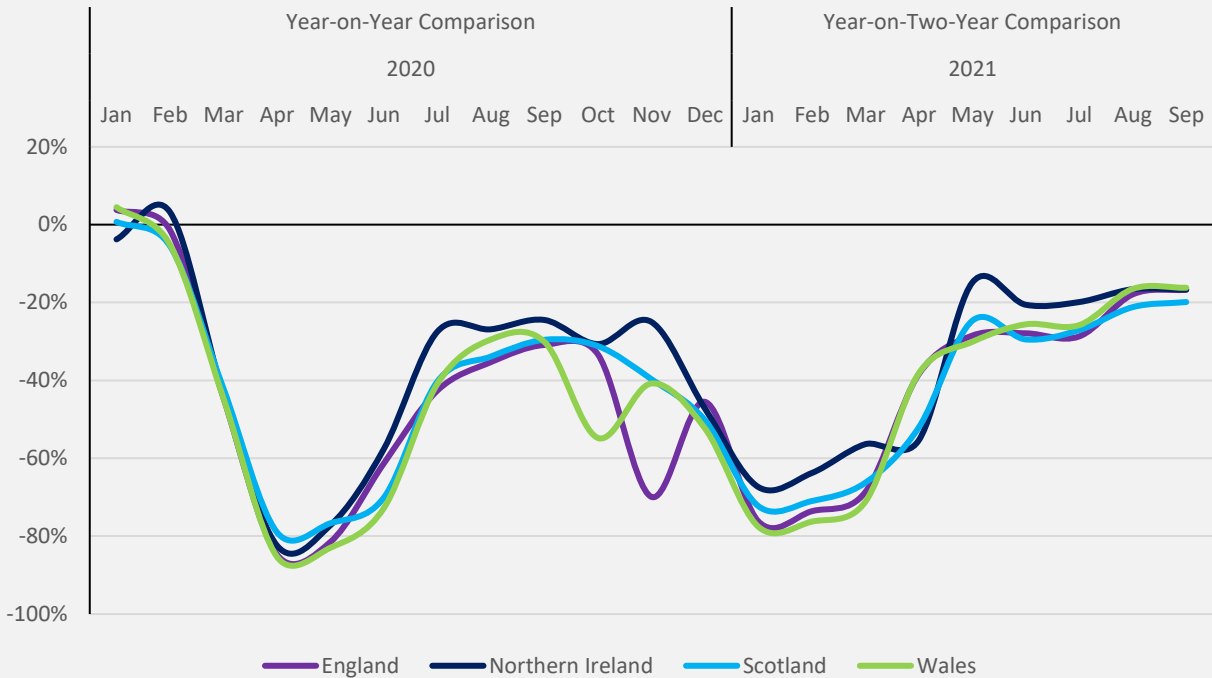
Year on Two Year

Shopping Centres

-35.6%

Year on Two Year

REGION FOOTFALL % CHANGE YOY AND YO2Y



SEPTEMBER FOOTFALL - UK's Nations

For the second consecutive month, Wales saw the strongest recovery of all the UK's nations in September, with a decline of 16.2%.

Also for the second consecutive month, Scotland lagged behind the rest of the UK in September, with a decline of 19.9%.

Northern Ireland and England both saw a Footfall decline of 16.7% in September.

Best Performing Nation

-16.2%

Wales (Yo2Y)

Worst Performing Nation

-19.9%

Scotland (Yo2Y)

UK FOOTFALL BY REGION

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TOTAL FOOTFALL BY REGION (% CHANGE ON 2019)

GROWTH RANK	REGION	% GROWTH Yo2Y
1	North West England	-11.1%
2	South West England	-11.2%
3	Yorkshire and the Humber	-12.1%
4	East Midlands	-13.3%
5	West Midlands	-13.4%
6	North East England	-13.9%
7	East of England	-15.0%
8	Wales	-16.2%
9	South East England	-16.5%
10	Northern Ireland	-16.7%
11	England	-16.7%
12	Scotland	-19.9%
13	London	-26.3%

REGIONAL BREAKDOWN

For the second consecutive month, North West England saw the strongest recovery in Footfall of all the regions of the UK in September, with a decline of 11.1% from the pre-pandemic levels in 2019.

For the fifth consecutive month, London was the worst performing of all the UK regions. The continued absence of international tourists will have no doubt been a factor in this result. Moreover, even though restrictions have been lifted, some people may still be averse to socialising, thereby impacting the frequency of shop visits.

Best Performing Region

-11.1%

North West England

Worst Performing Region

-26.3%

London

TOTAL FOOTFALL BY CITY (% CHANGE ON 2019)

GROWTH RANK	CITY	% GROWTH Yo2Y
1	Liverpool	-9.5%
2	Portsmouth	-9.8%
3	Leeds	-12.5%
4	Nottingham	-13.0%
5	Bristol	-13.7%
6	Manchester	-14.3%
7	Cardiff	-15.4%
8	Glasgow	-20.8%
9	Birmingham	-21.6%
10	Belfast	-22.2%
11	London	-25.5%

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 Liverpool, with a decline of 9.5%, topping the monthly growth rankings table for the first time this year.

For the fifth consecutive month, the worst performing city was London, with a decline of 25.5%. It was also the fifth time the city sat at the bottom of the growth rankings table in the last twelve months.

Best Performing City

-9.5%

Liverpool

Worst Performing City

-25.5%

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.

MEDIA ENQUIRIES

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

BRC Press Office
Lara Conradie
T: +44 (0)207 854 8924
M: +44 (0)7785 612 214
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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