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Solutions**

A comprehensive measure of
store and centre entries

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city

Compare weekly performance
by Country

BRC-SENSORMATIC IQ FOOTFALL MONITOR

April 2021

Period covered:
4 April 2021 – 1 May 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

“With the easing of restrictions on retail and some hospitality on 12th April, consumers have been returning to their local high streets, shopping centres and retail parks. This is reflected in the improving levels of footfall seen across the country, as consumers visit their favourite stores post-lockdown. While shops have worked incredibly hard to provide consumers with a safe and enjoyable shopping experience, it is unlikely we will see a return to pre-pandemic levels of footfall anytime soon, as social distancing measures naturally restrict retailers’ capacity. Retail parks continued to fare better than shopping centres and high streets, as they benefit from the presence of large stores, more space and on-site parking. However, it was encouraging to see footfall improve across all retail sites compared to the lockdown months.

“Growing consumer demand and footfall in the months ahead will be vital for the survival of many retailers, as they start to see costs increasing as stores reopen and colleagues return from furlough. With full business rates relief ending in England in June, the ongoing rates review needs to deliver on its objectives to reform the broken rates system and reduce the financial pressures on retailers, otherwise many stores and viable jobs will be under threat.”



Andy Sumpter | Retail Consultant - EMEA | Sensormatic Solutions

“April’s reopening of retail saw a welcome boost for the High Street. While footfall still remains 40% down compared to pre-pandemic levels in 2019, consumer demand signals for a return to in-store shopping were promising; despite occupancy limits restricting the numbers of customers allowed inside, shoppers happily braved long queues to get back in-store and shop their favourite brands in real life, after months confined to shopping from behind a screen.

Retailers will be hoping that the lift in shopper traffic seen during the first few weeks of unlocking can be sustained past pent-up demand in order to fuel long-term recovery. Our research shows an overwhelming amount of consumer support for bricks-and-mortar retail, with 71% of shoppers vowing to make a conscious effort to shop in-store now retail’s reopened, with many having missed the experience of in-store shopping when lockdown shuttered shops and other saying ‘screen fatigue’ had set in. Retailers will be counting on shoppers acting on that sentiment and voting with their feet to support the shops that serve their communities.”

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 took a large step in the right direction in April, as stores previously deemed non-essential were allowed to open their doors for the first time this year. This gave consumers the opportunity to make purchasing decisions that were not ideal through online only retailing. However, numbers remained significantly muted from those seen pre-pandemic, as structural restraints remain in place that restrict operations reaching maximum capacity.

Total Retail Footfall Index

As stores reopened during the month, Total UK Footfall decreased by 40.0% in April (Yo2Y), with a 28.7 percentage point improvement from March. This is above the 3-month average decline of 59.2%.

-40.0%

% change Year on Two Year

SHOPPING LOCATIONS:

High Street Footfall

Footfall on High Streets declined by 43.9% in April (Yo2Y). This is above the 3-month average decline of 61.2%.

-43.9%

% change Year on Two Year

Retail Park Footfall

Retail Parks saw footfall decrease by 30.5% (Yo2Y), 6.3 percentage points above last month's rate. This is above the 3-month average decline of 35.4%.

-30.5%

% change Year on Two Year

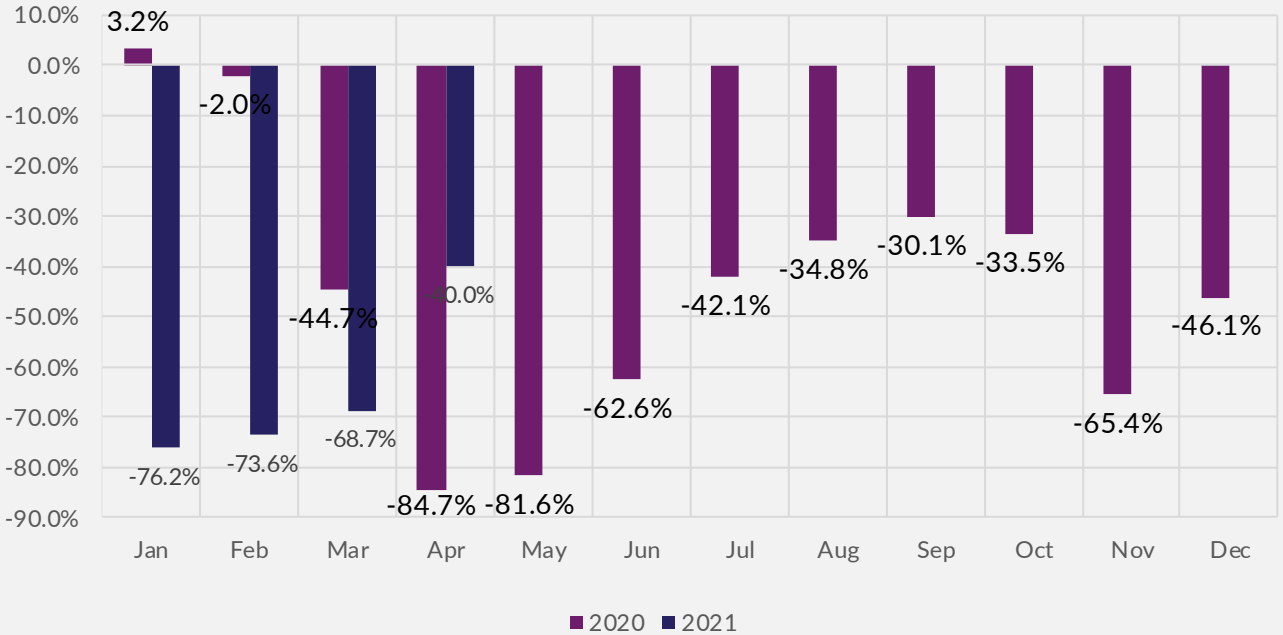
Shopping Centre Footfall

Shopping Centre footfall declined by 49.8% (Yo2Y). This is above the 3-month average decline of 67.2%.

-49.8%

% change Year on Two Year

TOTAL UK RETAIL FOOTFALL (% CHANGE ON 2019)



Footfall Takes a Big Step in the Right Direction

UK Footfall levels saw a significant recovery in April from those seen during the first three months of the year, helped in no small part by the reopening of non-essential retail stores in the second week of the month. The month's performance was a 28.7 percentage point improvement from that seen in March, but still remaining well below the normal pre-pandemic levels.

This muted recovery was caused largely by the ongoing restrictions in place that limit the absolute numbers of customers allowed in stores at any one time, coupled with the continued reluctance of people to visit crowded areas.

April

-40.0%

Year on Two Year

12-month average

-48.2%

Year on Year

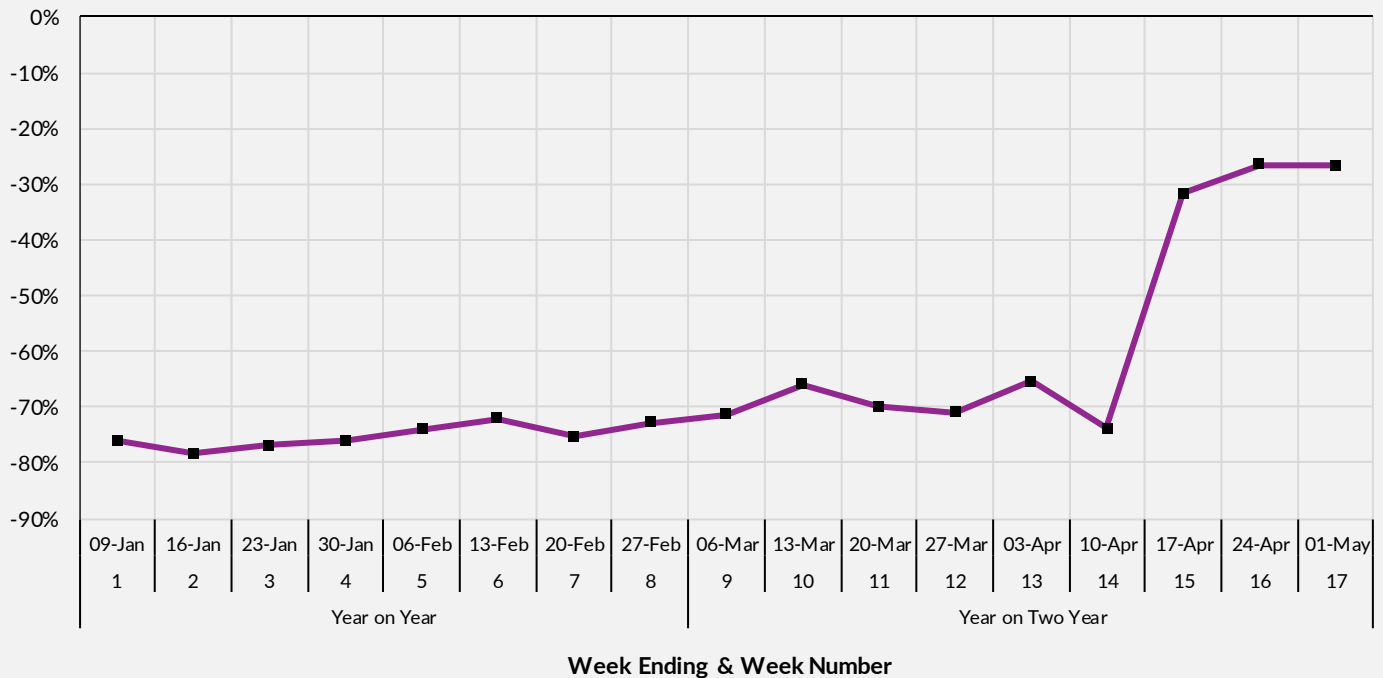
TOTAL FOOTFALL – BY WEEK

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FOOTFALL % CHANGE BY WEEK



APRIL UK WEEKLY FOOTFALL

The step-change in Footfall performance pre versus post reopening is best illustrated when looking at the weekly data. As stores reopened in week 15, footfall improved by 42.1 percentage points from week 14, which highlights the importance of retail outlets deemed non-essential for overall retail trade.

Footfall levels remained broadly stable over the final three weeks of the month, as the weather remained warm and dry, helping to incentivise consumers to visit the shops once again.

Week 14 (4 – 10 Apr)

-73.8%

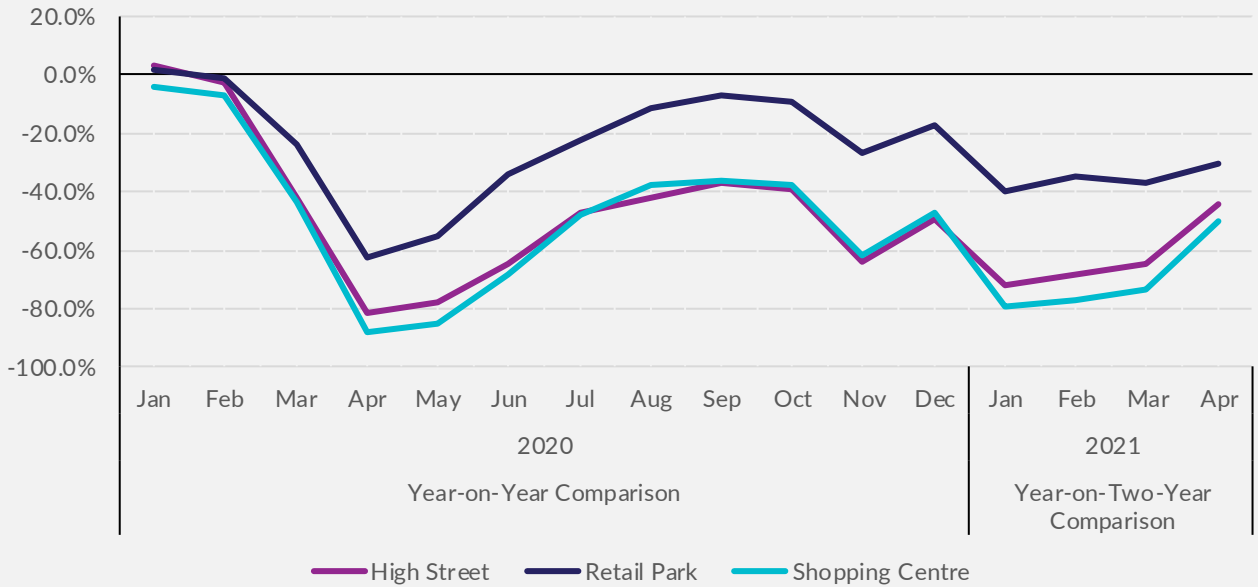
Year on Two Year

Week 15 (11 – 17 Apr)

-31.7%

Year on Two Year

FOOTFALL BY LOCATION (% CHANGE ON 2019)



Retail Parks Remain Ahead of Other Locations, But Gap Narrows

Retail Parks remained head and shoulders ahead of the pack, albeit still firmly in negative territory once again in April (on a year on two year basis). However, in percentage point terms, they benefitted least of all from the reopening of non-essential retail.

In April, Retail Parks saw a decline of 30.5% in comparison to the levels of footfall seen at the same point in 2019. This was only a 6.3 percentage point improvement from March.

High Street Footfall in the UK improved by 20.7 percentage points from March, to a decline of 43.9% in April.

Shopping Centres improved by 23.4 percentage points from March, to a decline of 49.8% in April.

Retail Parks

-30.5%

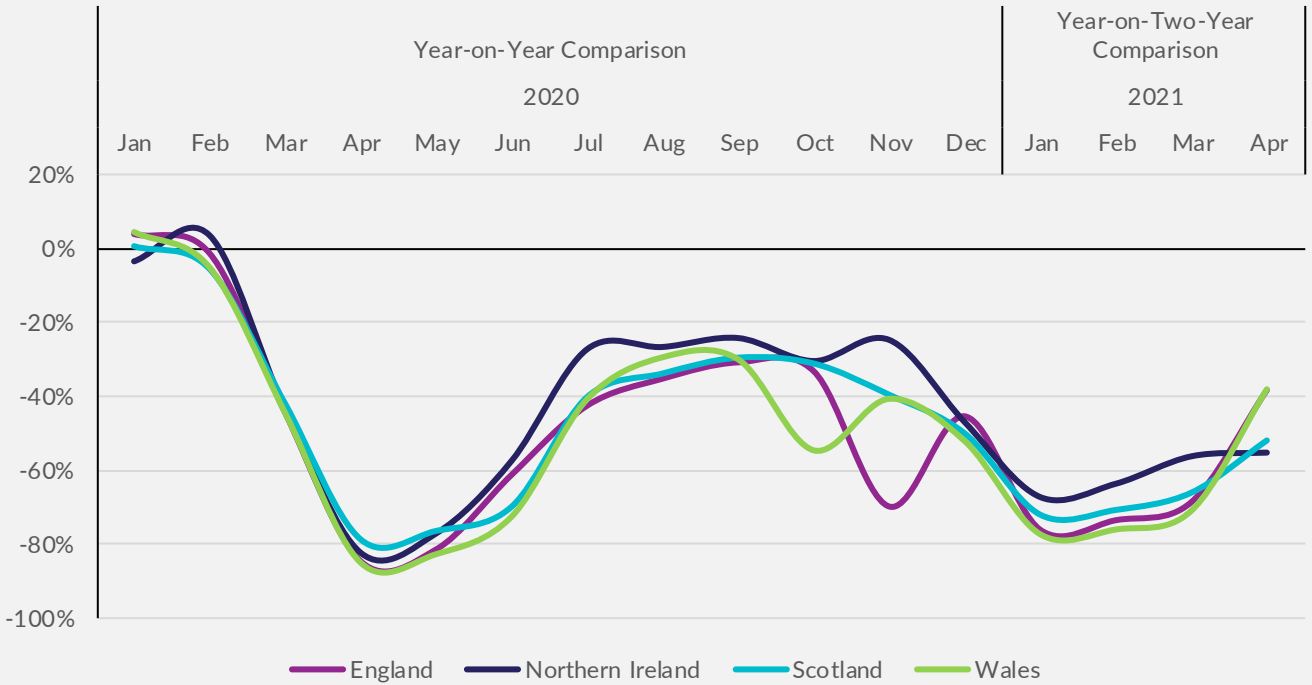
Year on Two Year

Shopping Centres

-49.8%

Year on Two Year

REGION FOOTFALL % CHANGE YOY BY WEEK



APRIL FOOTFALL – UK's Nations

Despite outperforming the other home nations during the beginning of the year, Northern Ireland lagged behind the rest of the UK in April. This was primarily driven by the slower easing of restrictions in comparison to the other nations.

Wales saw the strongest recovery of all the UK's nations in April, with a decline of 38.2%. This was particularly pleasing, given it was the worst performing nation in the preceding month.

Scotland saw a Footfall decline of 52.1% in April on a two year basis, as much like Northern Ireland, it was slower to ease restrictions in comparison to the rest of the UK. This left Scotland as the worst performing of all nations.

Worst Performing Region

-55.4%

Northern Ireland (Yo2Y)

Best Performing Nation

-38.2%

Wales (Yo2Y)

UK FOOTFALL BY REGION

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SHOPPING CENTRE FOOTFALL BY REGION (% CHANGE ON 2019)

GROWTH RANK	REGION	% GROWTH Yo2Y
1	East Midlands	-32.30%
2	East of England	-33.40%
3	South East England	-34.50%
4	North West England	-35.10%
5	South West England	-36.00%
6	West Midlands	-37.30%
7	Yorkshire and the Humber	-37.50%
8	Wales	-38.20%
9	England	-38.40%
10	North East England	-38.40%
11	London	-47.70%
12	Scotland	-52.10%

REGIONAL BREAKDOWN

The East Midlands saw the strongest recovery in Footfall of all the regions of the UK in April, with a decline of only 32.3% from the pre-pandemic levels in 2019.

As discussed in the previous page, Scotland was the worst performing of all the UK regions. But perhaps the most surprising result from April was the lack of recovery seen in London. The region remained 47.7% below the levels seen pre-pandemic.

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

-32.3%

East Midlands

Worst Performing Region

-52.1%

Scotland

TOTAL FOOTFALL BY CITY (% CHANGE ON 2019)

GROWTH RANK	CITY	% GROWTH Yo2Y
1	Cardiff	-35.5%
2	Liverpool	-36.0%
3	Leeds	-36.6%
4	Nottingham	-36.6%
5	Bristol	-41.0%
6	Manchester	-43.6%
7	London	-46.9%
8	Birmingham	-47.7%
9	Glasgow	-51.8%
10	Belfast	-55.3%

CITY TRACKER

Cities bore the brunt of the dearth in activity due to the lockdown at the beginning of the year. This was driven by two major factors, the first being the transition of workers away from the office to home-working. The second, was their relative inaccessibility due to many of them requiring public transport to visit from out of town.

In a similar fashion to the regions overall, Belfast accompanied the rest of Northern Ireland as the worst performing of all the cities in April, remaining at below half the levels of footfall seen pre-pandemic.

Cardiff was the strongest performing city in April, although still remaining over a third down on more normal levels seen in 2019.

Best Performing City

-35.5%

Cardiff

Worst Performing City

-55.3%

Belfast

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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