



SPRINGBOARD.

Easter 2022

Footfall Review

Two factors heavily influenced footfall activity in UK retail destinations over Easter this year.

The first factor was the warm and sunny weather which drew people to outdoor destinations rather than internal shopping environments.

The second factor was that this was the first Easter bank holiday weekend since 2019 with no Covid restrictions. This appears to have brought activity forward as consumers made trips to retail destinations in advance of Easter, rather than reserving shopping trips for the weekend itself.

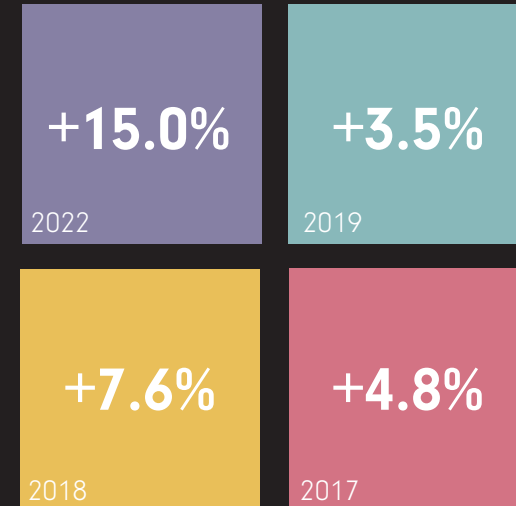
The trend in footfall over the week leading up to Easter 2022 compared with the week before followed a similar pattern to previous years.

However, this year, the week on week increases on each day from Monday to Thursday prior to Good Friday were greater than in each year since 2017, suggesting that a greater proportion of consumers made trips in advance of Easter.

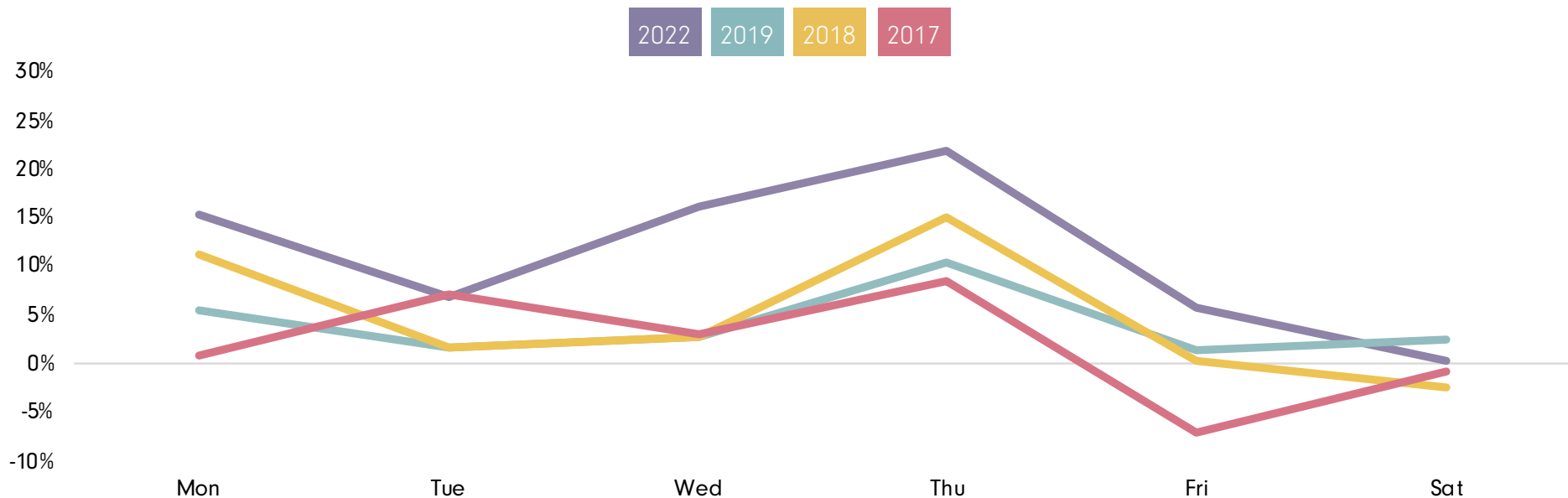
Between Monday and Thursday footfall rose from the week before by an average of +15% versus just +3.5% in 2019 and an average rise of +5.3% over the three years from 2017 to 2019.

Activity ramped up significantly on Wednesday and Thursday compared with previous years; on Wednesday this year footfall rose by +16.1% from the previous Wednesday compared with an average of +2.7% over the three years between 2017 and 2019, and on Thursday footfall rose by +21.9% versus an average of +11.3% between 2017 and 2019.

Average week on week % change between Mon to Thurs of Easter week



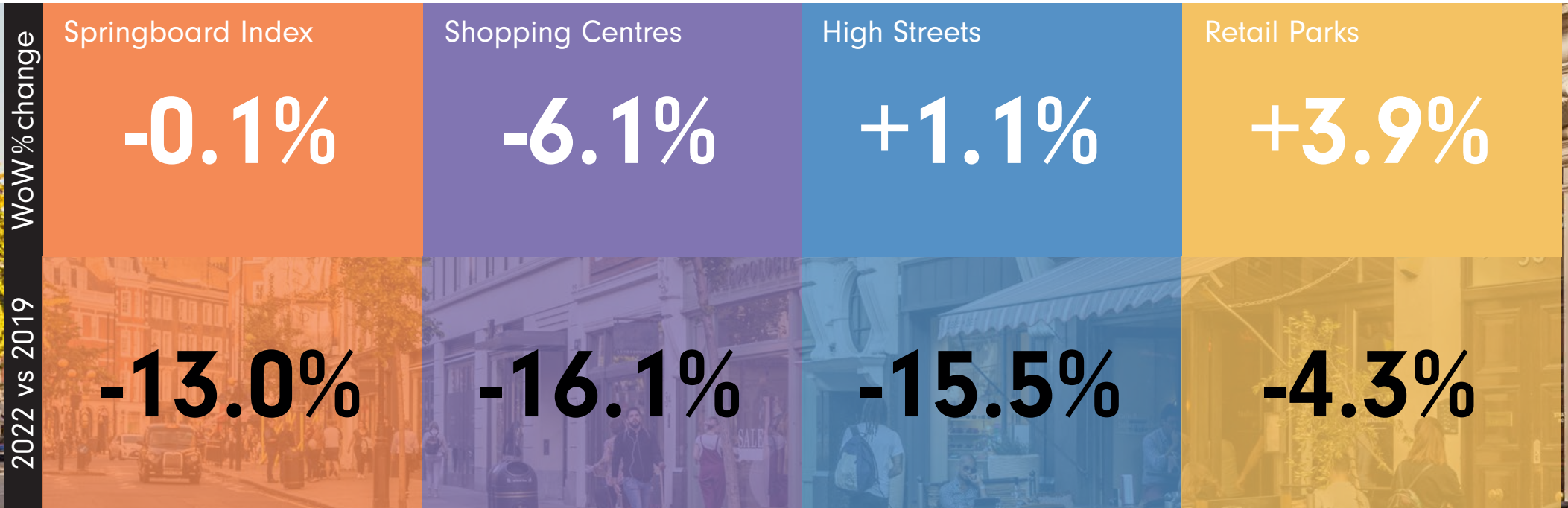
Week on week % change in footfall - week of Easter



Footfall over Easter bank holiday weekend 2022

Footfall across UK retail destinations over the Easter weekend as a whole was marginally lower than over the same three days in the previous week (-0.1%) and -13% lower than in 2019.

Of the three destination types retail parks were the winners, with a rise in footfall of +3.9% from the week before and a gap of just -4.3% from the 2019 footfall level. Footfall in high streets also rose (by +1.1%) but in shopping centres it declined by -6.1%. In both high streets and shopping centres, footfall was around -16% lower than in 2019.



Although footfall in retail parks rose by more than in high streets or shopping centres over the weekend as a whole, there was a significant variation in performance from day to day.

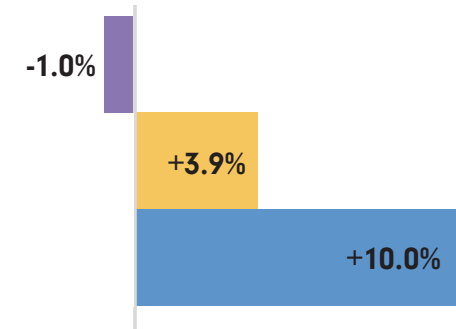
Retail parks are traditionally the destination of choice for shoppers over Easter as the bank holiday is a peak time for carrying out home and garden improvements. However, the warm weather and the first opportunity for friends and family to meet without restrictions since 2019 meant that footfall in retail parks only rose by +3.9% on Good Friday and dropped marginally by -0.6% on Saturday versus a rise of +10% from the week before in high streets on Good Friday followed by a rise of +2.9% on Easter Saturday.

On Easter Monday, however, retail parks bounced back with footfall rising by +8.8% from the week before, which is likely to have been driven by shoppers replenishing food and groceries after the weekend.

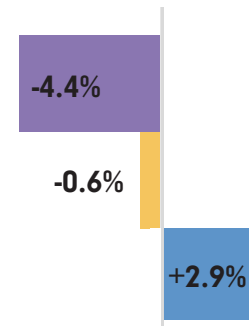
Footfall in shopping centres was lower than the same days in the previous week on each of the three trading days over Easter, and their performance worsened as the weekend progressed (-1% on Good Friday, -4.4% on Easter Saturday and -15.2% on Easter Monday).

Week on week % change in footfall

Good Friday



Easter Saturday



Easter Monday



Footfall over Easter by town type

The favourable weather drove footfall up by +17.5% in coastal towns over the Easter weekend from the week before and by +5.9% in historic towns, with other types of town faring less well.

However, the results varied from day to day over the weekend. On Good Friday all types of town recorded a rise in footfall, with the clear winner being coastal towns where footfall was +33.6% up on the previous week.

On Saturday footfall continued to rise (albeit more modestly) in all types of town other than Central London, which was likely to have been hampered by the closure of Euston station. By Monday, however, footfall was lower than on the Monday before, with significant drops in market towns, Central London and other large cities around the UK.



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