



**Sensormatic  
Solutions**

Comprehensive measure of  
store customer traffic

Benchmark by UK nations,  
location type and major cities

# **BRC-SENSORMATIC IQ FOOTFALL MONITOR**

**June 2023**

Period covered:  
28 May – 01 July 2023

# Headline commentary



**Helen Dickinson OBE | Chief Executive | British Retail Consortium**

“Footfall was down on June last year as the hot weather meant that people opted to enjoy the outdoors. Shopping patterns are still finding a new balance, as the high cost of living is affecting people’s habits and choices. We saw fewer visits to shopping centres and retail parks than last year. But High Street locations were busier and footfall in major cities also improved, thanks to an increase in international tourism.

“The UK is the only European destination without tax-free shopping: Government must capitalise on the uptick in tourism by reintroducing VAT relief for overseas visitors to boost the UK’s attractiveness compared to other destinations and stimulate spending. Government should also seek to mitigate the impact of the slew of cost pressures continuing to bear down on the industry, including new regulation and an inflationary whack to business rates next spring.”



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**Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions**

“We saw the far-reaching ripple effect of April’s UK inflation peak taking hold this month, with the three-month rolling average for UK footfall in June dipping down into negative figures (-1.1%) for the first time this year. While UK shopper traffic made a marginal gain in June compared to May, which will be some positive news for retailers, the ongoing cost-of-living pressure is set to continue to impact shopper behaviour and undermine consumer confidence. However, with the tide of food price inflation looking like it is finally – and albeit slowly - starting to recede, retailers will be looking ahead to July, and hoping to benefit from ambient footfall from the school holiday period.”

Note: Last month we decided not to publish while we made improvements to the methodology. All figures are now calculated using precise shopper numbers entering stores in the UK, whichever destination they are located. Previously, Retail Parks and Shopping Centres were calculated using shopper numbers to the location – not to the stores within them. The new method is simpler, consistent across all numbers, and provides a more accurate measurement of retail footfall.

## Executive Summary

The year-on-year footfall data indicates a favourable pattern during the early months of the year, with January showing a notable increase compared to the previous year, followed by February and March with smaller yet positive increases. However, the rate of growth diminishes in April, where the increase is modest. The trend then shifts negatively in May, displaying a decrease compared to the previous year, which persists in June. However, the decline in footfall from May to June was mitigated to some extent, as June showed a slight improvement compared to the previous month.

### ▼ Total Retail Footfall Index

- Decreased by -1.9% points compared to last year, Jun-22
- Improved by +0.9% points from the previous month, May-23
- Rolling 3-mth average fell to -1.1%

**-1.9%**  
% change YoY

### BY SHOPPING LOCATION:

#### ▲ High Street Footfall:

- Improved by +0.6% points compared to last year, Jun-22
- Improved by +1.1% points from the previous month, May-23
- Rolling 3-mth average fell to +1.1%

**+0.6%**  
% change YoY

#### ▼ Retail Park Footfall:

- Decreased by -2.6% points compared to last year, Jun-22
- Improved by +1.5% points from the previous month, May-23
- Rolling 3-month average fell to +1.8%

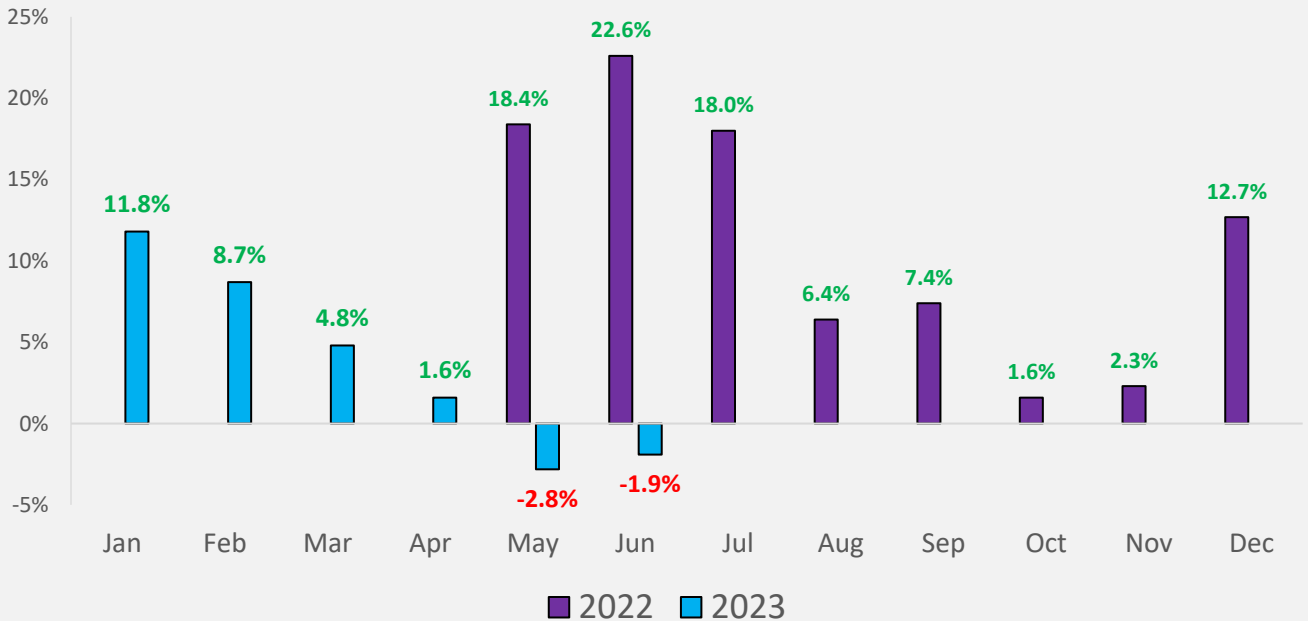
**-2.6%**  
% change YoY

#### ▼ Shopping Centre Footfall

- Decreased by -4.2% points compared to last year, Jun-22
- Improved by +0.6% points from the previous month, May-23
- Rolling 3-month average fell to +2.9%.

**-4.2%**  
% change YoY

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



## Shopper numbers up in June

*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 June, there was a +0.9% improvement in UK total retail footfall compared to May.
- There was a decrease in UK total retail footfall compared to the same month last year, following a previous decline in May. However, prior to these declines, there was a consistent positive trend in footfall compared to the previous year, with notable increases observed in different months.
- Notwithstanding the recent decline, the general pattern indicates a positive year-on-year increase in footfall for the majority of months, signalling a favourable growth trajectory in the retail industry.

June 2023

**-1.9%**

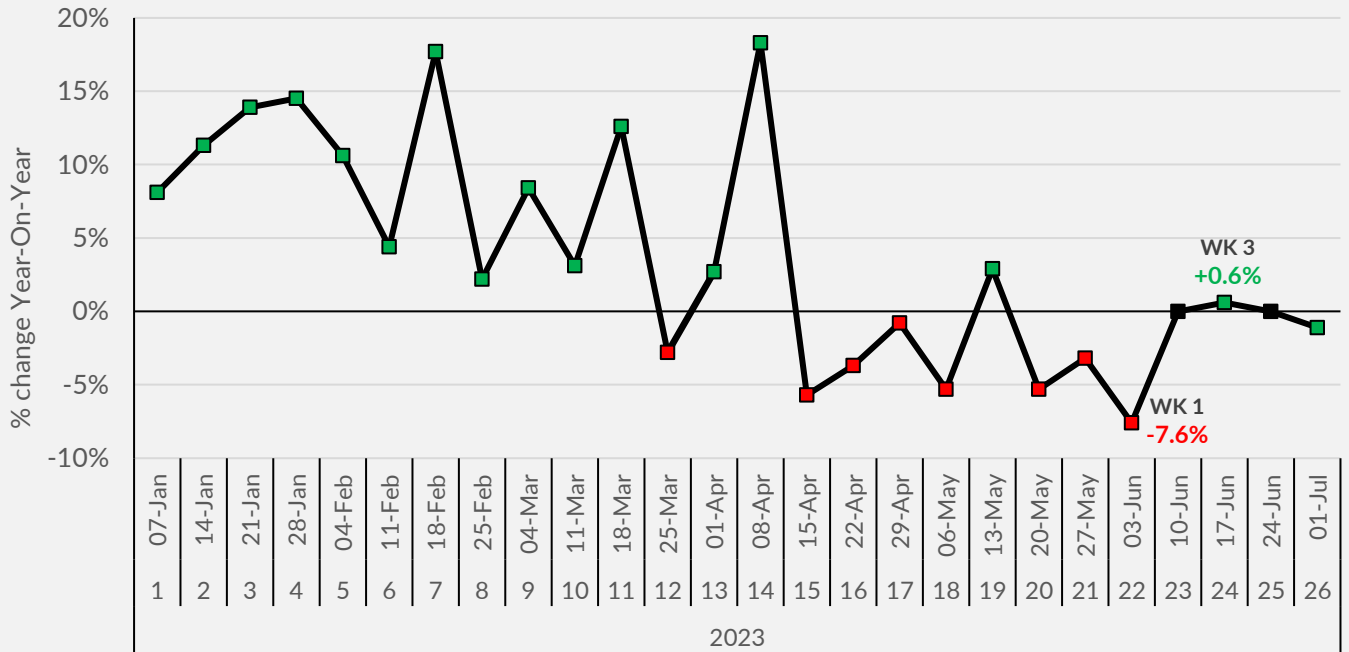
Year-on-Year

12-month rolling avg

**+6.6%**

Year-on-Year

## WEEKLY TOTAL RETAIL FOOTFALL (% CHANGE YoY)



## JUNE 2023 UK WEEKLY FOOTFALL

- Footfall is higher for one out of the five weeks compared to the equivalent weeks in June 2022.
- The third week experienced a notable increase in footfall, ranking as the fourth strongest performance in the past three months.
- Footfall in the first week was the weakest observed so far this year. However, it is important to consider that the Jubilee weekend coincided with the same week in the previous year, which most likely would have influenced the comparison.
- Overall, the data indicates fluctuating footfall in the retail sector, with a projected gradual improvement but unlikely return to pre-pandemic levels.

3rd Week of Jun-23 (11 - 17 Jun)

**+0.6%**

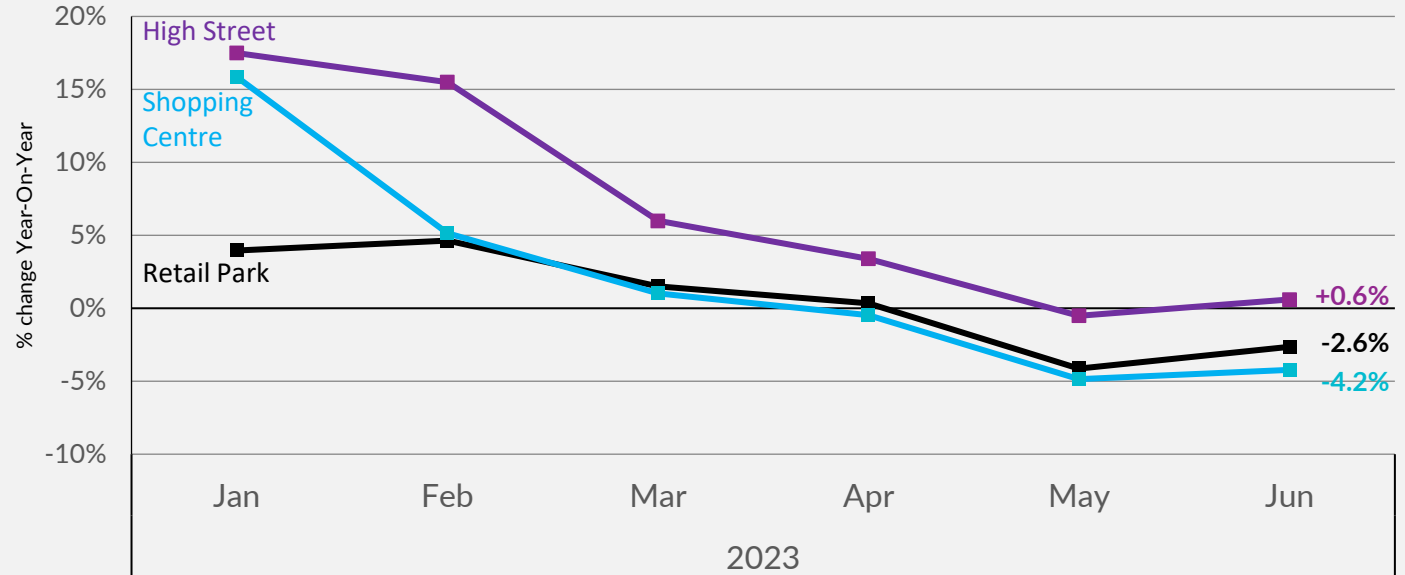
Year-on-Year

1st Week of Jun-23 (28 May - 03 Jun)

**-7.6%**

Year-on-Year

## FOOTFALL BY LOCATION (% CHANGE YoY)



## Retail recovery remains driven by High Streets

YoY: There was a decline of -1.9% in overall UK retail footfall.

- **High Street**
  - **↑+0.6% compared to June 2022**
  - Rolling 3-month avg **↑+1.1%**
  - Rolling 6-month avg **↑+7.1%**
- **Retail Park**
  - **↓-2.6% compared to June 2022**
  - Rolling 3-month avg **↑+1.8%**
  - Rolling 6-month avg **↑+0.6%**
- **Shopping Centre**
  - **↓-4.2% compared to June 2022**
  - Rolling 3-month avg **↑+2.9%**
  - Rolling 6-month avg **↑+2.1%**

## 2023 thus far:

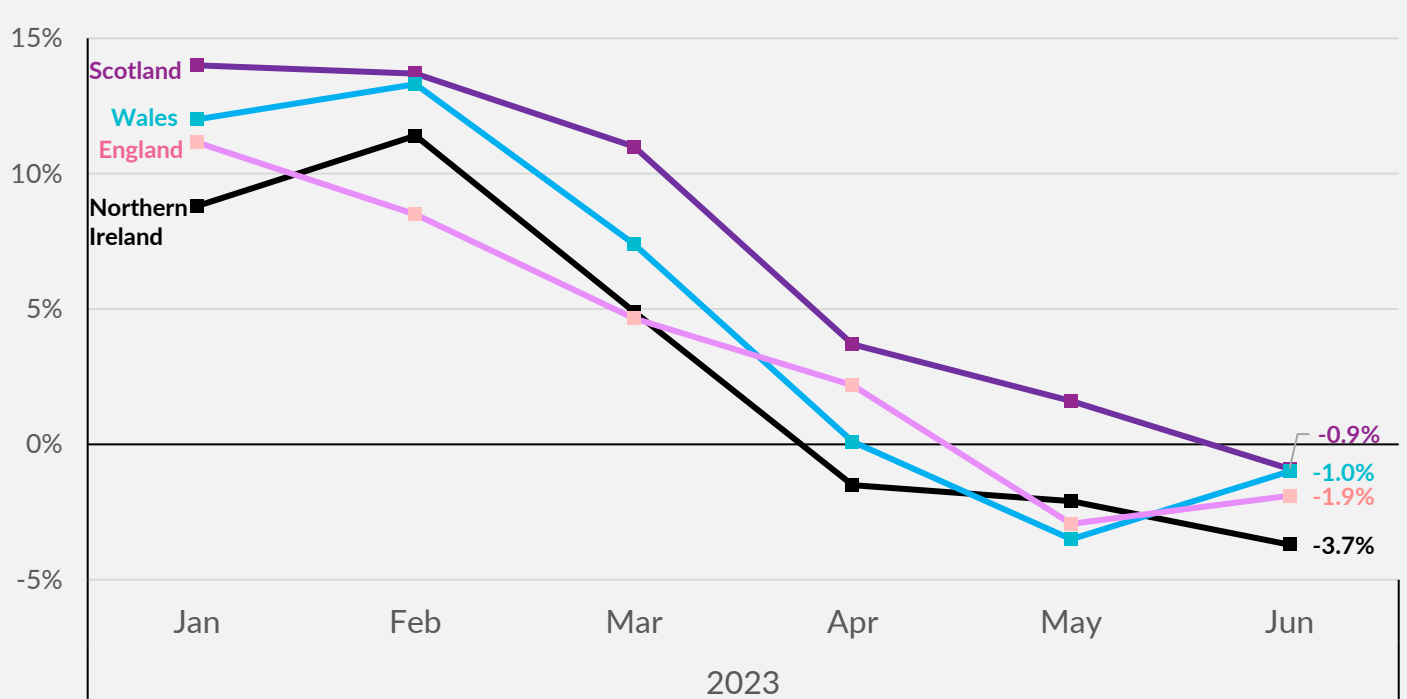
- In January 2023, High Street footfall displayed a notable increase, while Retail Park footfall and Shopping Centre footfall also grew.
- The positive trend continued into February with further rises observed in all three categories.
- However, footfall in these areas experienced declines during May and June, though the extent of the decrease varied among them.
- Overall, the data suggests that consumer behaviour is changing, and people are gradually returning to physical retail locations, particularly in urban areas

High Street  
**+0.6%**  
Year-on-Year

Retail Park  
**-2.6%**  
Year-on-Year

Shopping Centre  
**-4.2%**  
Year-on-Year

## NATIONAL FOOTFALL (% CHANGE YoY)



## UK Nations

vs June 2022

## Scotland Footfall:

- **↓-0.9% compared to June 2022**
- Strongest recovery of all the UK's nations
- **↓** growth rate compared to May-23
- Strongest national recovery over the last six months

▼ -0.9% 

## Wales Footfall:

- **↓-1.0% compared to June 2022**
- **↑** growth rate compared to May-23
- Following May, weakest monthly recovery seen in the last six months

▼ -1.0% 

## England Footfall:

- **↓-1.9% compared to June 2022**
- **↑** growth rate compared to May-23
- Similar to other nations, generally positive trend with decline in May and June

▼ -1.9% 

## Northern Ireland Footfall:

- **↓-3.7% compared to June 2022**
- Weakest recovery of all the UK's nations
- **↓** growth rate compared to May-23
- Weakest monthly recovery seen in the last 6 months

▼ -3.7% 

# UK FOOTFALL BY ENGLISH REGION

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## TOTAL FOOTFALL BY REGION (% CHANGE YoY)

JUN-23 RANK	RANK CHANGE	REGION	% GROWTH YoY	
			Jun-23	May-23
1	↔	London	+0.6%	+0.2%
2	▲+1	South-East England	-1.1%	-2.4%
2	▲+2	North-West England	-2.3%	-4.6%
3	↔	West Midlands	-2.4%	-4.5%
3	▼-3	South-West England	-2.7%	-1.5%
6	↔	East of England	-4.0%	-5.2%
7	▲+1	Yorkshire and the Humber	-4.2%	-7.5%
8	▼-1	East Midlands	-4.7%	-5.3%
9	↔	North-East England	-5.6%	-8.3%

## ENGLAND REGIONAL BREAKDOWN

- **London** again saw the **strongest footfall** performance in Jun-23
- **↑ +0.6%** compared to Jun-22
- Strongest recovery for the third consecutive month
- **North-West England** saw the **highest ascent** up the ranking table in Jun-23
- **Up 2 spots**, from position 5 to 3
- **South-West England** saw the **biggest ranking drop** in Jun-23
- **Down 5 spots**, from position 2 to 5
- **North-East England** was again the **worst-performing** region in Jun-23
- **↓ -5.6%** compared to Jun-22
- Weakest recovery for the third consecutive month

Best Performing Region

**+0.6%**

London

Worst Performing Region

**-5.6%**

North-East England



## TOTAL FOOTFALL BY CITY (% CHANGE YoY)

JUN-23 RANK	RANK CHANGE	REGION	% GROWTH YoY	
			Jun-23	May-23
1	↔	Edinburgh	4.7%	+7.7%
2	↔	London	0.6%	+0.2%
2	▲ +6	Cardiff	0.0%	-7.9%
3	▲ +6	Leeds	-1.3%	-8.0%
3	▲ +3	Manchester	-1.9%	-6.4%
6	▼ -2	Bristol	-2.6%	-3.5%
7	▼ -2	Liverpool	-3.0%	-4.1%
8	▲ +3	Birmingham	-5.2%	-9.7%
9	▼ -3	Nottingham	-5.9%	-5.2%
10	▼ -7	Belfast	-6.6%	-0.6%
11	▼ -4	Glasgow	-7.2%	-5.2%

## CITY TRACKER

## Major Cities:

- Average **up** compared to June last year
- June average **↑** 1.3% compared to May
- Following May, lowest monthly average seen in 2023 so far

## Best Performing City:

- **Edinburgh**
- **↑** +4.7% compared to June last year
- **↓** -3.0% compared to May
- Strongest monthly % growth for 5 out of the last 6 months

## Best Performing City

**+4.7%**

Edinburgh

## Worst Performing City:

- **Glasgow**
- **↓** -7.2% compared to June last year
- **↓** -2.0% compared to May
- For the first time in 2023, weakest monthly % growth

## Worst Performing City

**-7.2%**

Glasgow

## 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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