



**Sensormatic  
Solutions**

Comprehensive measure of  
store customer traffic

Benchmark by UK nations,  
location type and major cities

# **BRC-SENSORMATIC IQ FOOTFALL MONITOR**

**October 2023**

Period covered:  
01 October – 28 October 2023

# Headline commentary



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

“Umbrellas were up as heavy rainfall descended across the UK in October, leading many shoppers to stay at home. As inflationary pressures on households begin to ease, some people are shopping around slightly less, braving the rain only to make their final purchases. This led to a larger year on year drop in footfall in all shopping locations than we saw in September.

“While consumer confidence may be higher than 2022 it is still very weak, dropping over the last month. The economic landscape remains tough, with input prices and cost pressures above normal levels. Retailers are investing heavily in their Christmas offering – trying to provide the best value and service for their customers. The Government must ensure it does not unnecessarily burden retailers with additional costs and the Autumn Budget offers an opportunity to avoid a £470m-per-year business rates rise, which would push up prices and limit industry growth.”



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

“October saw overall footfall decline again year-on-year, off the back of subdued September figures, with shopper traffic regionally impacted by Storm Babet which delivered the most severe and widespread disruptive weather of the year to date. The ongoing cost-of-living pressure continues, despite inflationary easing, to impact shopper behaviour through October. Our destination data seems to show that consumers are visiting fewer stores during each trip. This suggests a move away from shopping around for the lowest prices and best deals toward more focused purchasing as consumers become more accepting of the current reality of paying more to buy less. With this in mind, retailers must capture customer loyalty and spend as early as possible. As we head into the critical Christmas purchasing period the focus must be on optimising their online presence or creating engaging experiences that can entice passing trade in-store to be converted into sales.”

# Executive Summary

During October 2023, there was a notable 5.7% year-on-year decrease in footfall, which was more pronounced compared to the decline observed in September. While earlier in the year, there had been robust growth in footfall, this pattern changed, leading to a sequence of declines beginning in May, with October becoming a pivotal month characterized by a substantial year-on-year decrease. This decline in footfall reflected shifts in consumer behaviour driven by concerns about cost-of-living pressures, leading people to adopt more cautious and selective spending habits.

## Total Retail Footfall Index

- Oct-23: footfall fell ↓5.7% (YoY)
- Compared to Sep-23: footfall fell ↓2.8% points
- Rolling 3-mth average: fell ↓2.3% points

↓5.7%

% change YoY

### BY SHOPPING LOCATION:

#### Retail Park Footfall:

- Oct-23: footfall fell ↓4.3% (YoY)
- Compared to Sep-23: footfall fell ↓1.9% points

↓4.3%

% change YoY

#### High Street Footfall:

- Oct-23: footfall fell ↓4.6% (YoY)
- Compared to Sep-23: footfall fell ↓2.9% points

↓4.6%

% change YoY

#### Shopping Centre Footfall

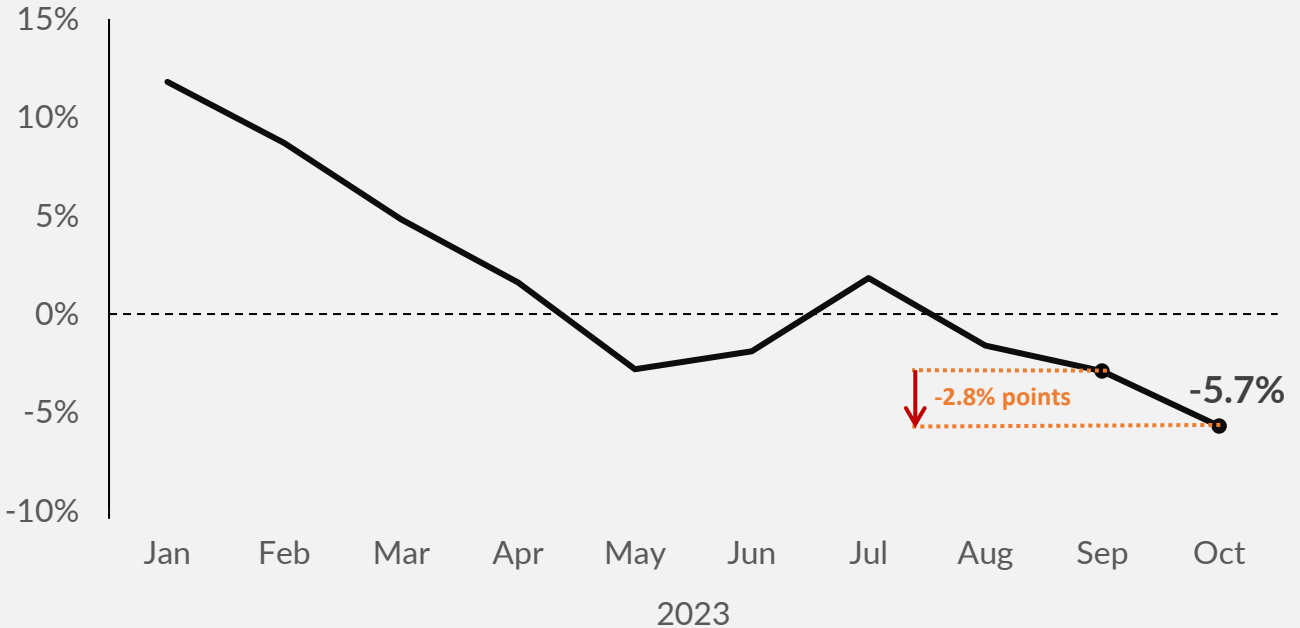
- Oct-23: footfall fell ↓7.3% (YoY)
- Compared to Sep-23: footfall fell ↓3.3% points

↓7.3%

% change YoY

YoY = Year-On-Year (comparing the current month with the same month from the previous year.)

## MONTHLY TOTAL UK RETAIL FOOTFALL (% CHANGE YOY)



## Rainy conditions dampen footfall.

- In **October 2023**, there was a **5.7% fall** in **UK total retail footfall** compared to October last year.
- There was a **drop of 2.8% points** when compared to **Sep-23 footfall**.
- This decrease can be attributed to:
  - **Economic factors:** If consumers are concerned about their financial stability, they may cut back on discretionary spending, which can result in reduced footfall.
  - **Seasonal Shifts:** October falls just before the holiday shopping season. Consumers may be delaying their purchases until November (Black Friday) or December, when they anticipate better deals and discounts.

Oct 2023

**5.7%**

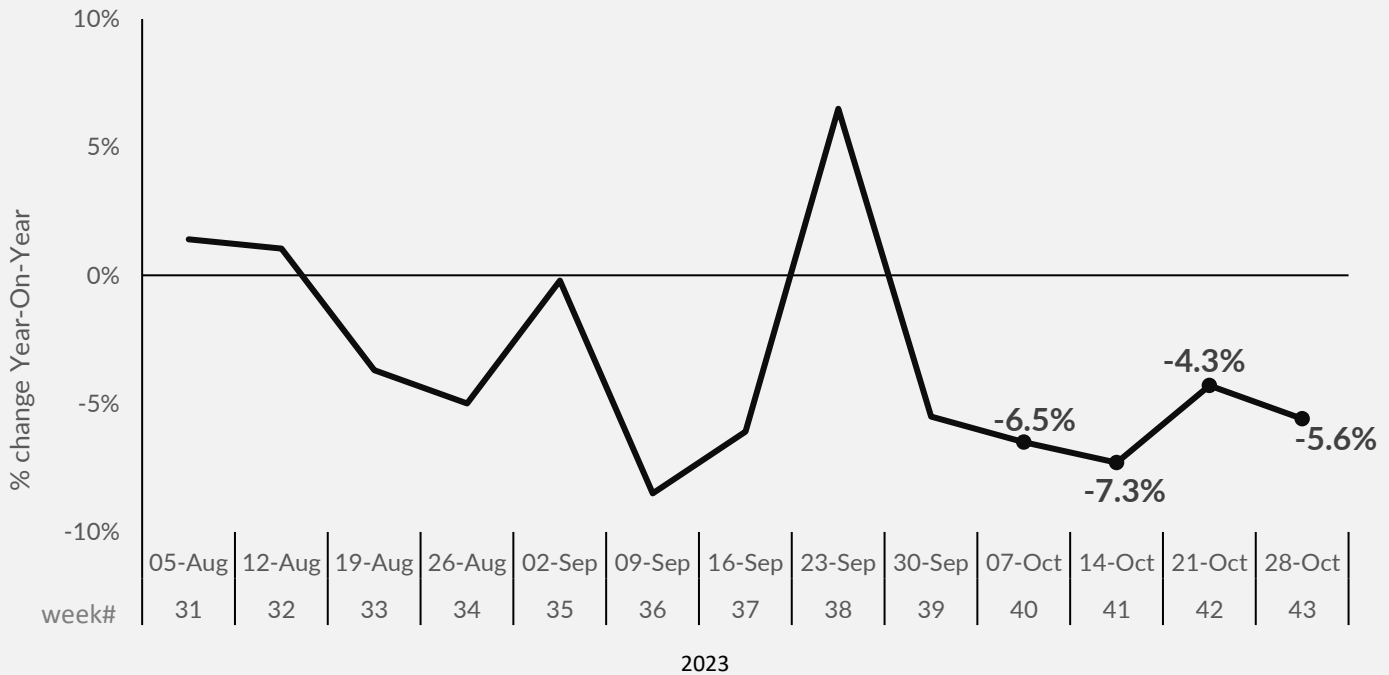
Year-on-Year

12-month rolling avg

**2.6%**

Year-on-Year

## WEEKLY TOTAL RETAIL FOOTFALL (% CHANGE YEAR-ON-YEAR)



## OCTOBER 2023 UK WEEKLY FOOTFALL

- October consists of 4 calendar weeks.
- Footfall is lower for all four weeks compared to last year.
- Overall, October 2023 showed a consistent downward trend in retail performance throughout the month, with varying degrees of decline in each week. Factors such as economic conditions, consumer behaviour, and seasonal effects may have contributed to these negative trends.
- In broad terms, the data accentuates the responsiveness of retail trends to external influences, underscoring the necessity for retailers to modify their approaches and for policymakers to offer support to the industry amidst periods of unpredictability.

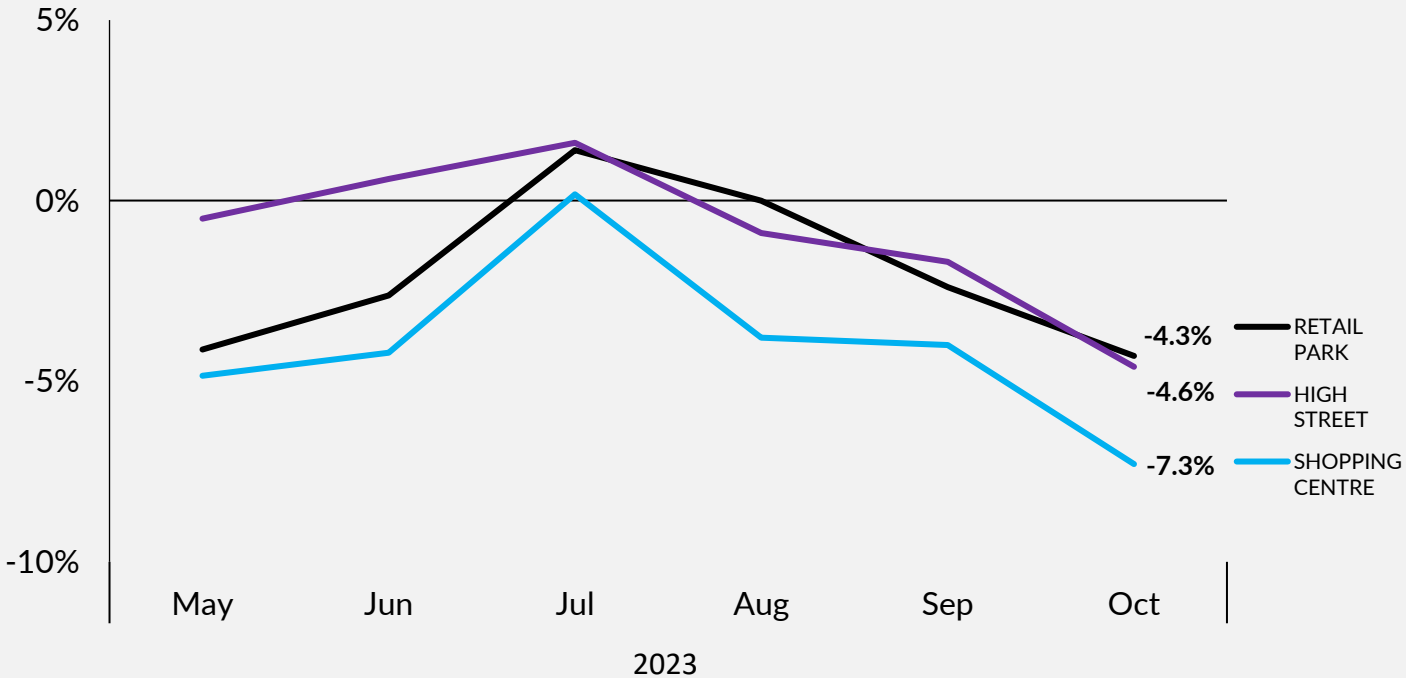
Oct-23 strongest week  
Third week (week 42/52)

↓ **4.3%**  
Year-on-Year

Oct-23 weakest week  
Second week (week 41/52)

↓ **7.3%**  
Year-on-Year

FOOTFALL BY LOCATION (% CHANGE YEAR-ON-YEAR)



## Oct-23: Retail Park secures lead position

- **Retail Park:**
  - Oct-23: footfall fell ↓4.3% (YoY)
  - Compared to Sep-23: footfall fell ↓1.9% points
- **High Street:**
  - Oct-23: footfall fell ↓4.6% (YoY)
  - Compared to Sep-23: footfall fell ↓2.9% points
- **Shopping Centre:**
  - Oct-23: fell ↓7.3% (YoY)
  - Compared to Sep-23: footfall fell ↓3.3% points

### 2023 thus far:

- Retail Parks maintained early-year growth, peaking in Feb-23, with stability in Jun-23 and Jul-23, but it also saw a consistent decline from Aug-23 to Oct-23.
- High Streets started the year with strong positive growth in Jan-23 and Feb-23, followed by a deceleration in growth, transitioning to a consistent decline from Aug-23 to Oct-23.
- Shopping Centres also had strong growth in Jan-23 but experienced a significant decline in Feb-23, followed by generally negative or minimal growth throughout the year, with a substantial decline in Oct-23.

### Retail Park

↓ **4.3%**  
Year-on-Year

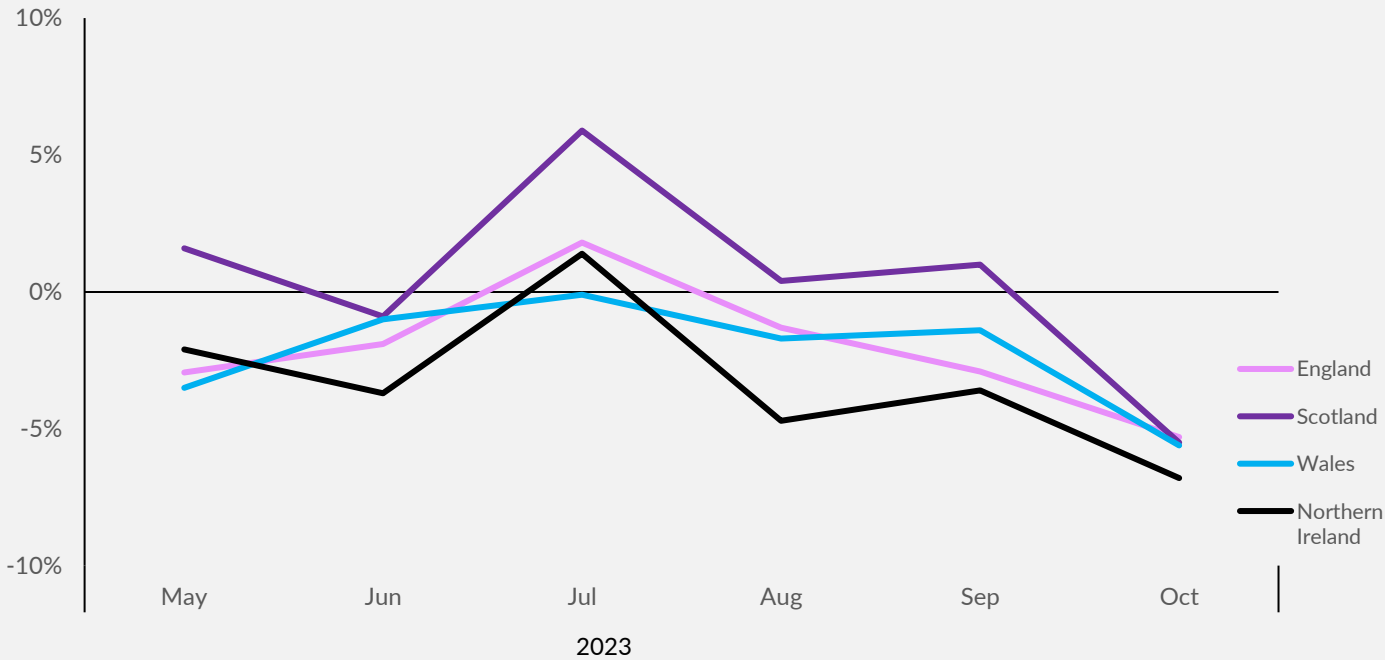
### High Street

↓ **4.6%**  
Year-on-Year

### Shopping Centre

↓ **7.3%**  
Year-on-Year

## NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



## UK Nations

vs Oct 2022

## England:

- Oct-23: footfall fell ↓5.3% (YoY)
- Compared to Sep-23: footfall fell ↓1.6% points
- Least significant drop in footfall of all the UK nations

↓ 5.3%



## Scotland:

- Oct-23: footfall fell ↓5.5% (YoY)
- Compared to Sep-23: footfall fell ↓6.5% points
- First month this year Scotland has not seen the strongest national YoY growth

↓ 5.5%



## Wales:

- Oct-23: footfall fell ↓5.6% (YoY)
- Compared to Sep-23: footfall fell ↓4.2% points
- Sixth consecutive month in negative YoY territory

↓ 5.6%



## Northern Ireland:

- Oct-23: footfall fell ↓6.8% (YoY)
- Compared to Sep-23: footfall fell ↓3.2% points
- Weakest recovery of all the UK's nations for the third consecutive month

↓ 6.8%



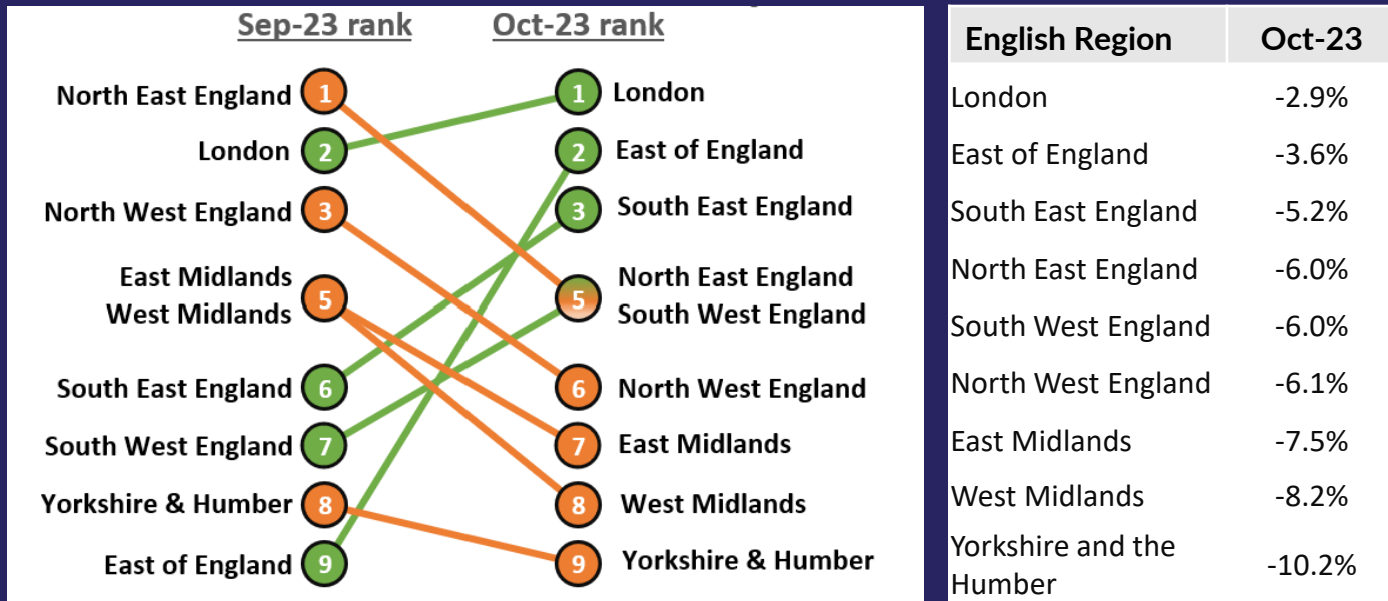
# UK FOOTFALL BY ENGLISH REGION

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## TOTAL FOOTFALL BY REGION (% CHANGE YEAR-ON-YEAR)



## ENGLAND REGIONAL BREAKDOWN

### Strongest footfall performance this month

- London
- Oct-23: footfall fell ↓2.9% (YoY)
- Compared to Sep-23: footfall fell ↓2.0% points
- Strongest performing region for 7/10 months this year

### Weakest footfall performance this month

- Yorkshire and the Humber
- Oct-23: footfall fell ↓10.2% (YoY)
- Compared to Sep-23: footfall fell ↓4.5% points
- Worst-performing region for the first time this year

### Most significant climb in the ranking table this month

- East of England
- ↑7 spots, from position 9 (bottom of the table) to position 2

### Most significant drop in the ranking table this month

- North East England
- ↓4 spots, from position 1 (top of the table) to joint position 5

### Best Performing Region

↓ 2.9%

London

### Worst Performing Region

↓ 10.2%

Yorkshire and the Humber



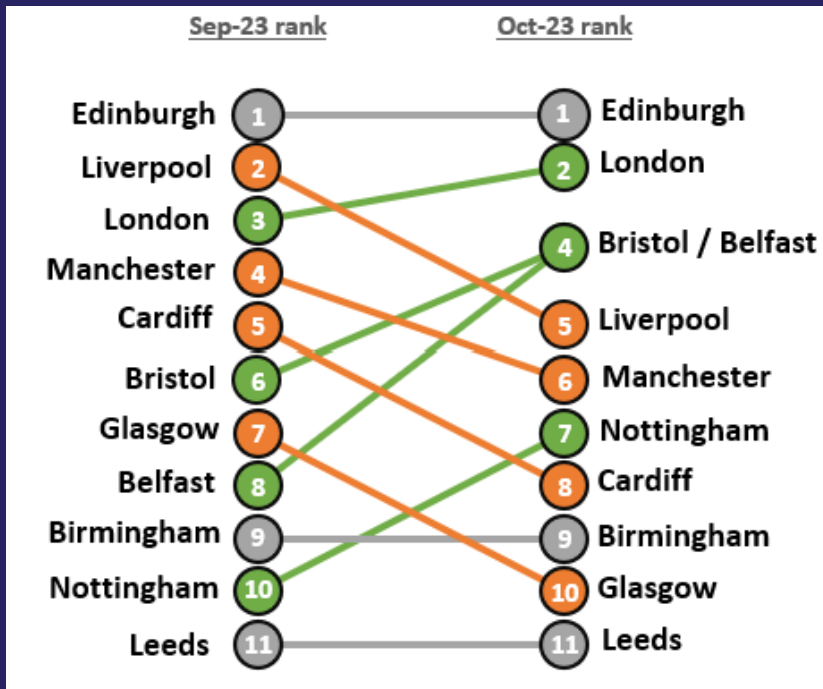
# UK FOOTFALL BY CITY

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## TOTAL FOOTFALL BY CITY (% CHANGE YEAR-ON-YEAR)



City	Oct-23
Edinburgh	+0.5%
London	-2.9%
Bristol	-3.2%
Belfast	-3.2%
Liverpool	-3.5%
Manchester	-5.2%
Nottingham	-6.3%
Cardiff	-6.5%
Birmingham	-7.9%
Glasgow	-8.9%
Leeds	-9.7%

## CITY TRACKER

### Major Cities:

- Oct-23: YoY average change: -5.2%
- Compared to Sep-23 city average: footfall fell ↓3.6% points
- City average in negative YoY territory for five out of the last five months

### Best Performing City:

- **Edinburgh**
- Oct-23: improved ↑ 0.5% (YoY)
- Compared to Sep-23: footfall fell ↓7.0% points
- Strongest monthly performance for nine out of the last ten months

### Best Performing City

↑ **0.5%**  
Edinburgh

### Worst Performing City:

- **Leeds**
- Oct-23 fell ↓9.7% (YoY)
- Compared to Sep-23 YoY change: fell ↓4.3% points
- Weakest monthly performance for the second consecutive month

### Worst Performing City

↓ **9.7%**  
Leeds

## 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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