Sensormatic Solutions

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

November 2023

Period covered:
29 October – 25 November 2023

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"A slight uptick in consumer confidence, as well as easing inflationary pressures and more predictable weather, led to an improvement in footfall compared to the previous month. After a slow October start, the month-long Black Friday sales helped to get shoppers out to their town and city centres. While all parts of the UK saw footfall drop in October; both West Midlands and Yorkshire managed positive growth in November.

"The extensive cost-pressures on the retail industry over the last two years have limited investment and driven up prices at many shopping destinations. The Chancellor's failure to commit to a business rates freeze in his recent Autumn Statement will inflict hundreds of millions of pounds in additional costs. This will inevitably slow the decline in inflation, as well as limiting long term investment and limiting any upside from improvements in UK footfall."

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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"Despite disruption from Storm Ciaràn earlier in the month, November's footfall rallied, buoyed by Black Friday trading and retailers offering extended discounts to spark early Christmas spend and secure festive share of wallet. Last month, footfall recovered to its highest performance levels since July, however, it's worth noting that, while welcome, this recent boost to retailers has been driven by price and promotions sensitive shopping behaviours. Discounting events have proved a major draw, with footfall on Black Friday rising +52.4% week-on-week for example. We have also seen that improvements in total retail footfall last month were significantly shored up by outlet store visits, as consumers try to make spend go further. Undoubtedly, footfall's recovery in November will allow retailers to look ahead to Christmas trading with more confidence, but the challenge will be not just encouraging ongoing spend into December when disposable incomes remain squeezed, but also ensuring discounting is optimised to protect margin."

Executive Summary

In November, footfall demonstrated resilience amid the challenging trend observed in the previous months. While the overall year-on-year trajectory showed a decline of -0.7%, it was a relatively stable performance compared to the larger drops in September and October. Despite the persisting challenges, November's modest decrease suggests a potential slowing down of the negative trend and offers hope for a more stable trajectory in the coming months.

Total Retail Footfall Index

- Nov-23: footfall fell ↓**0.7**% (YoY)
- Compared to prior month: footfall improved ↑**5.0**% points

- Rolling 3-mth average: fell ↓**2.9**% (YoY)
- Compared to prior 3-mth avg : improved ↑**0.3**% points

↓**0.7%**

% change YoY

BY SHOPPING LOCATION:

Retail Park Footfall:

- Nov-23: footfall fell ↓**1.0**% (YoY)
- Compared to prior month: footfall improved ↑**3.3**% points

↓**1.0%**

% change YoY

High Street Footfall:

- Nov-23: footfall fell ↓**1.7**% (YoY)
- Compared to prior month: footfall improved ↑**2.9**% points

↓**1.7%**

% change YoY

Shopping Centre Footfall

- Nov-23: footfall fell ↓**2.2**% (YoY)
- Compared to prior month: footfall improved ↑**5.1**% points

↓**2.2%**

% change YoY

*YoY = Year-On-Year (compares a specific time period with the corresponding period from the preceding year)

RETAIL FOOTFALL

BRC - Sensormatic IQ Footfall Monitor

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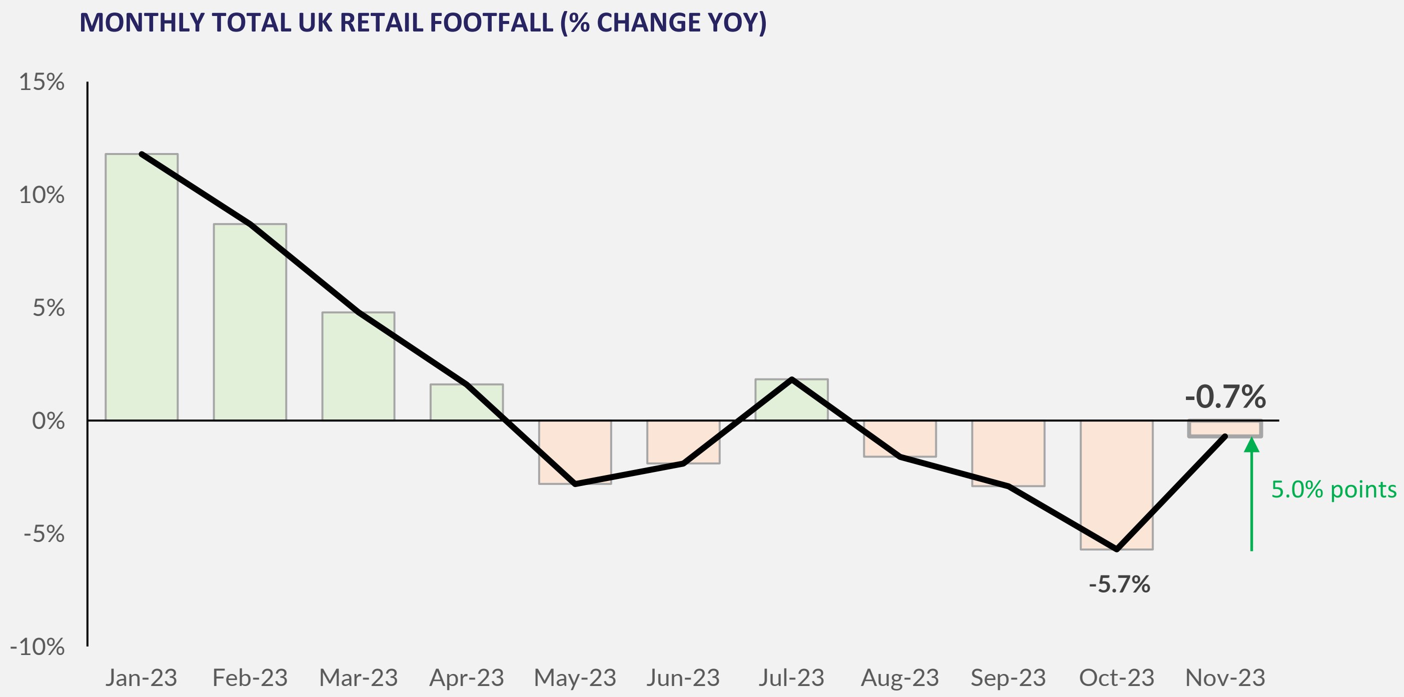

Early signs of footfall recovery

- In **November 2023**, there was a **0.7% fall** in **UK total retail footfall** compared to November of last year.
- There was an improvement **of 5.0% points** when **compared** to **Oct-23 footfall**.
- This improvement can be attributed to:
    - **Economic factors:** A subtle upswing in consumer confidence, driven by a heightened belief in economic stability and positive financial prospects, played a role in boosting footfall.
    - **Seasonal Shifts**: Following a sluggish beginning in October, the extended Black Friday sales throughout the month played a pivotal role in enticing shoppers to visit their local town and city centers.

Nov 2023

↓0.7%

Year-on-Year

3-month rolling avg

↓2.9%

Year-on-Year

TOTAL FOOTFALL – BY WEEK

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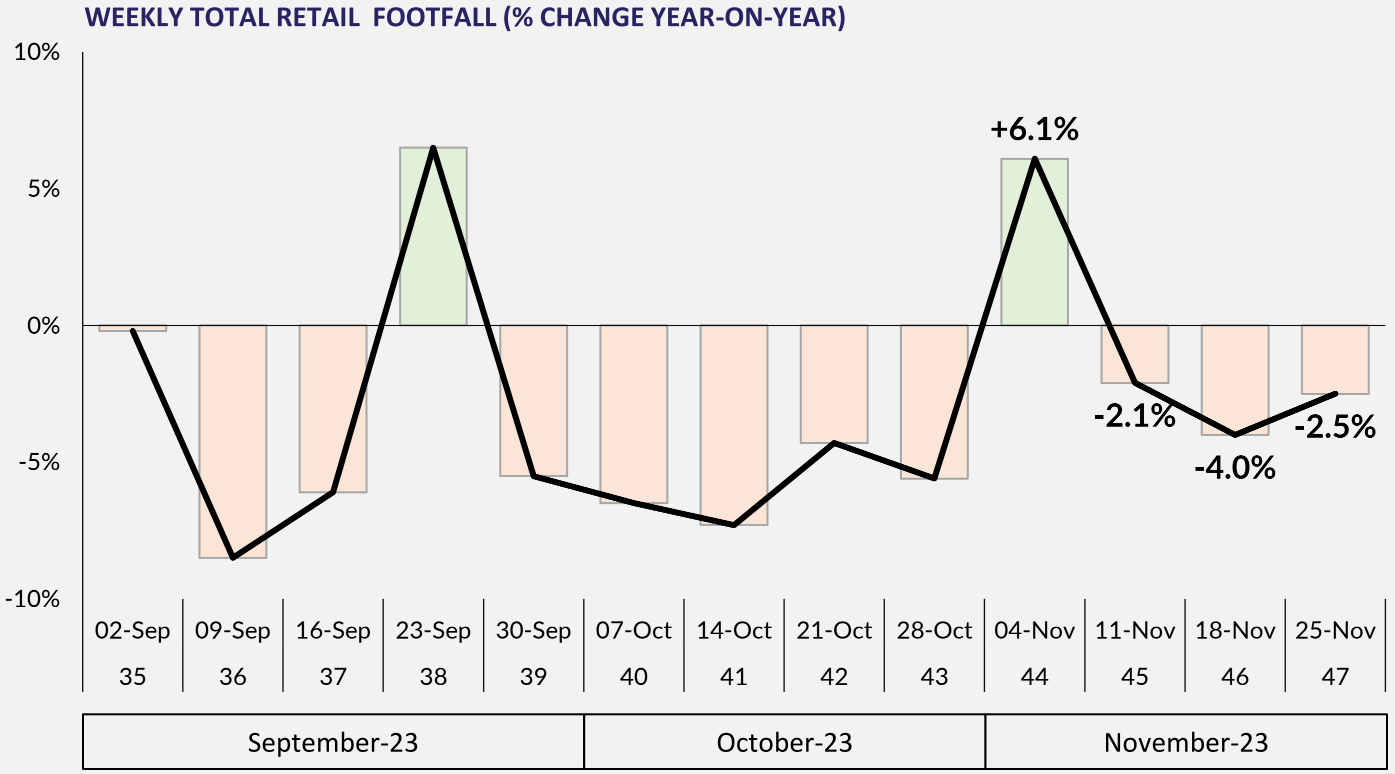

NOVEMBER 2023 UK WEEKLY FOOTFALL

- November consists of 4 calendar weeks.
- Footfall is lower for three out of the four weeks compared to last year.
- In November, YoY footfall growth marked a distinct improvement compared to the preceding months of September and October.
- While these months experienced varying degrees of decline, November showed a positive shift in overall trends.
- Notably, Week 1 displayed a significant recovery. And although Weeks 2, 3 and 4 witnessed declines, the overall November trend suggests a more favourable performance compared to the declining patterns observed earlier.

Nov-23 strongest week

First week (week 44/52)

↑6.1%

Year-on-Year

Nov-23 weakest week

Third week (week 46/52)

↓4.0%

Year-on-Year

FOOTFALL BY RETAIL LOCATION

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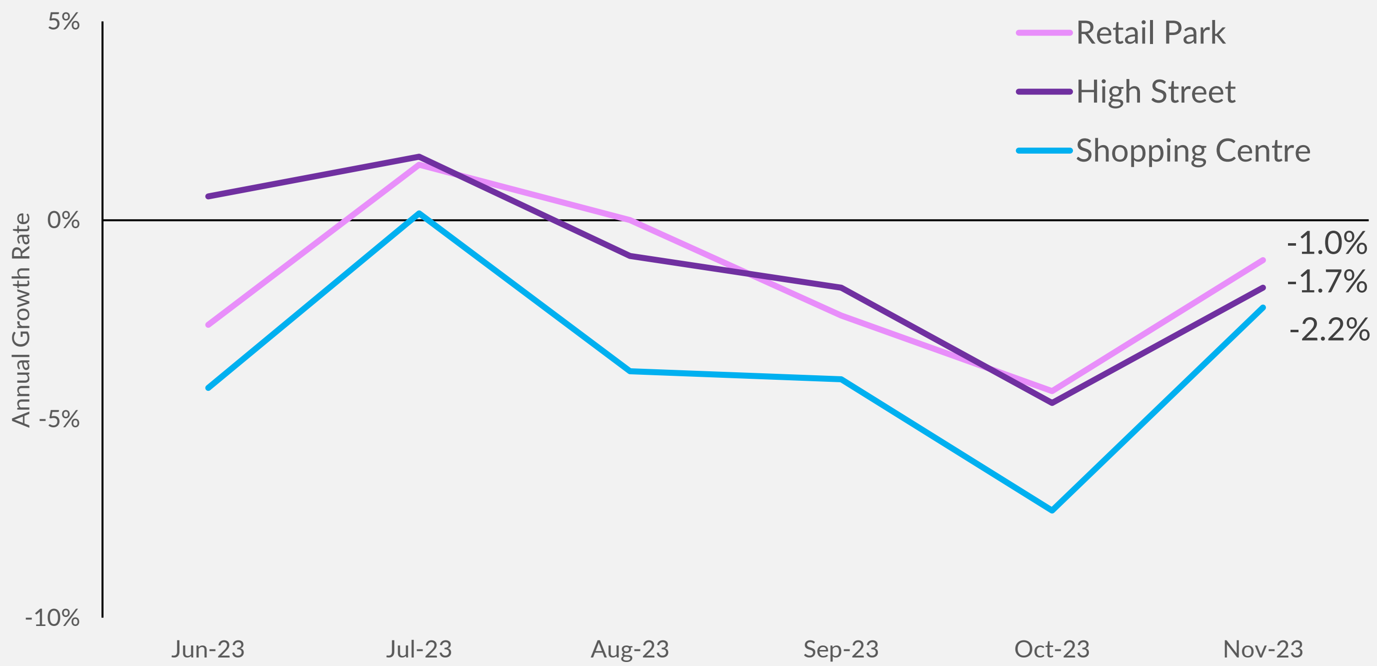
FOOTFALL BY LOCATION (% CHANGE YEAR-ON-YEAR)



Nov-23: Retail Park continues to lead the way

- **Retail Park:**
  - **Nov-23: footfall fell ↓1.0% (YoY)**
  - Compared to prior month: footfall improved ↑3.3% points
- **High Street:**
  - **Nov-23: footfall fell ↓1.7% (YoY)**
  - Compared to prior month: footfall improved ↑2.9% points
- **Shopping Centre:**
  - **Nov-23: fell ↓2.2% (YoY)**
  - Compared to prior month: footfall improved ↑5.1% points

Last 6 months:

- Retail Park footfall saw YoY declines in June, September, and October. However, there was a slight recovery in November, suggesting a potential shift in the year-on-year trend.
- High Street footfall had positive year-on-year trends in June and July but declined notably in October. Again, November exhibited a partial recovery, suggesting a potential stabilization.
- Shopping Centre footfall declined in June, August, September, and October, with the most notable drop in October. Nevertheless, akin to the other two locations, November demonstrated an increase in recovery and showcased the most substantial improvement compared to October.

Retail Park

↓1.0%

Year-on-Year

High Street

↓1.7%

Year-on-Year

Shopping Centre

↓2.2%

Year-on-Year

UK TOTAL FOOTFALL BY REGION

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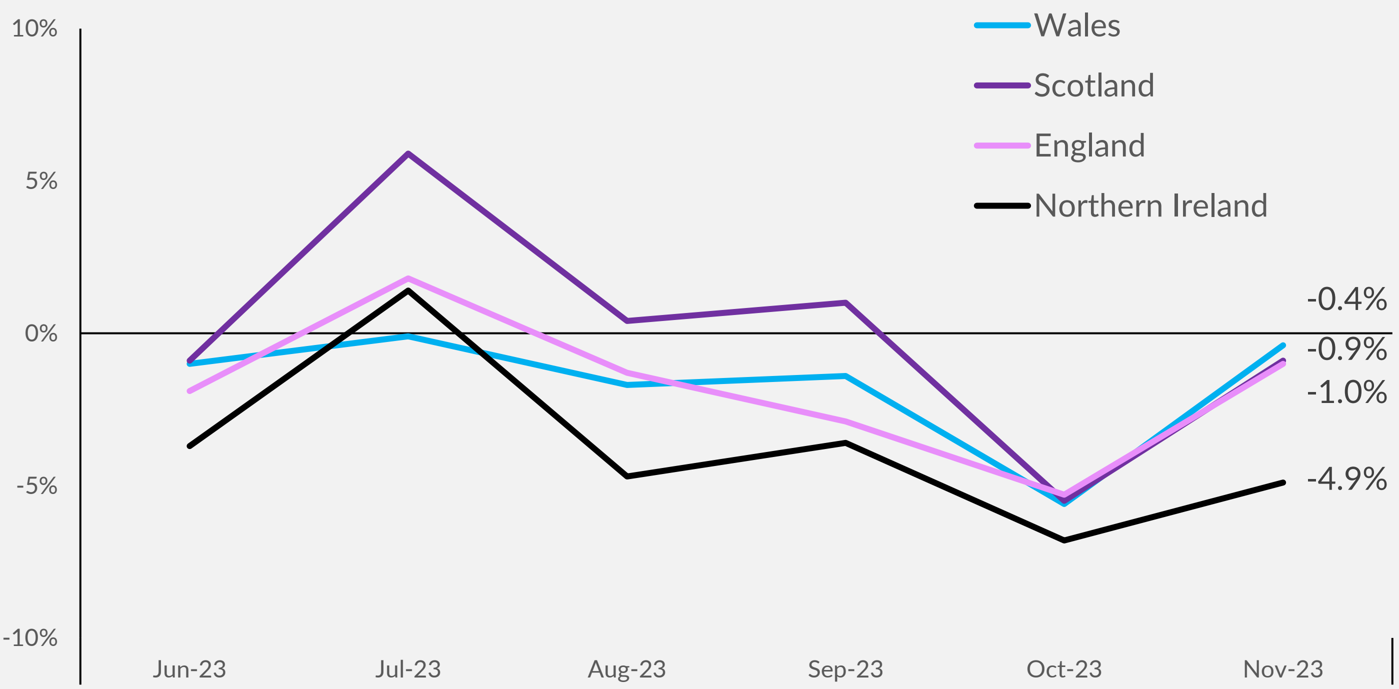
NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



UK Nations

Nov 2023 vs Nov 2022

Wales:

- **Nov-23: footfall fell ↓0.4% (YoY)**
- Compared to prior month: footfall improved ↑5.2% points
- Strongest Wales YoY recovery seen since Jul-23
- First time to top the nation recovery table since Mar-22

↓0.4%

Scotland:

- **Nov-23: footfall fell ↓0.9% (YoY)**
- Compared to prior month: footfall improved ↑4.6% points
- Third weakest Scotland YoY month recovery seen this year

↓0.9%

England:

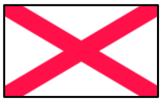
- **Nov-23: footfall fell ↓1.0% (YoY)**
- Compared to prior month: footfall improved ↑4.3% points
- Strongest England YoY month recovery seen since Jul-23

↓1.0%

Northern Ireland:

- **Nov-23: footfall fell ↓4.9% (YoY)**
- Compared to prior month: footfall improved ↑1.9% points
- Weakest recovery of all the UK's nations for the fourth consecutive month

↓4.9%



UK FOOTFALL BY ENGLISH REGION

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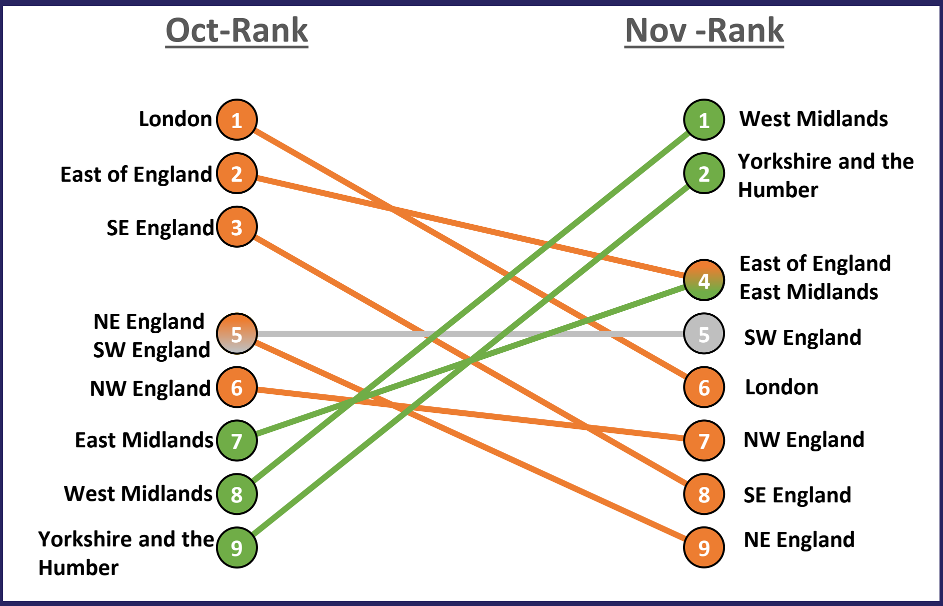
TOTAL FOOTFALL BY REGION (% CHANGE YEAR-ON-YEAR)



English Region	Nov-23
West Midlands	+1.7%
Yorkshire and the Humber	+0.5%
East Midlands	-0.1%
East of England	-0.1%
South West England	-0.3%
London	-0.4%
North West England	-1.2%
South East England	-2.4%
North East England	-2.8%

ENGLAND REGIONAL BREAKDOWN

Strongest footfall performance this month

- **West Midlands**
- **Nov-23: footfall improved ↑1.7% (YoY)**
- Compared to prior month: footfall improved ↑9.9% points
- Last time best-performing region = Mar-22

Weakest footfall performance this month

- **North East England**
- **Nov-23: footfall fell ↓2.8% (YoY)**
- Compared to prior month: footfall improved ↑3.2% points
- Last time worst-performing region = Jun-23

Most significant climb in the ranking table this month

- **West Midlands**
- ↑7 spots, from position 8 to top of the table
- **Yorkshire and the Humber**
- ↑7 spots, from position 9 (bottom of the table) to position 2

Most significant drop in the ranking table this month

- **London**
- ↓5 spots, from position 1 (top of the table) to 6
- **South East England**
- ↓5 spots, from position 3 to 8

Best Performing Region

West Midlands

↑1.7%

% change YoY

Worst Performing Region

North East England

↓2.8%

% change YoY

UK FOOTFALL BY CITY

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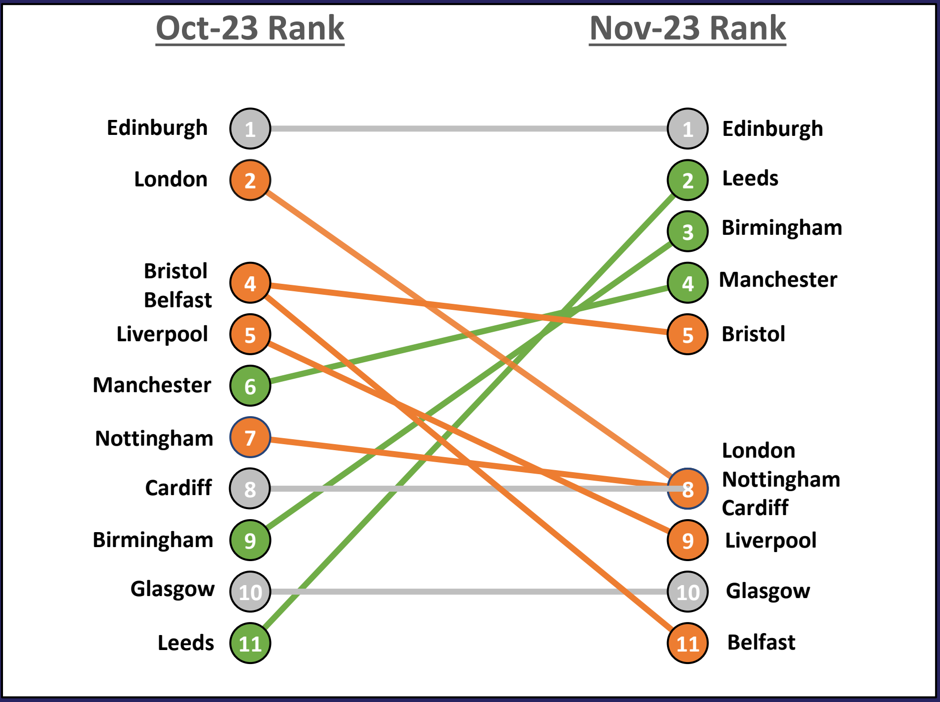
TOTAL FOOTFALL BY CITY (% CHANGE YEAR-ON-YEAR)



City	Nov-23
Edinburgh	5.7%
Leeds	3.1%
Birmingham	2.5%
Manchester	0.1%
Bristol	-0.1%
London	-0.4%
Nottingham	-0.4%
Cardiff	-0.4%
Liverpool	-2.4%
Glasgow	-4.5%
Belfast	-7.6%

CITY TRACKER

Major Cities:

- **Nov-23 average: ↓0.4% (YoY)**
- Compared to prior month: average improved ↑**4.8**% points
- City average in negative YoY territory for six out of the last seven months

Best Performing City:

- **Edinburgh**
- **Nov-23: improved ↑5.7% (YoY)**
- Compared to prior month: footfall improved ↑5.2% points
- Strongest monthly performance for ten out of the last eleven months

Best Performing City

Edinburgh

↑5.7%

% change YoY

Worst Performing City:

- **Belfast**
- **Nov-23 fell ↓7.6% (YoY)**
- Compared to prior month: footfall fell ↓4.4% points
- Weakest monthly performance for three out of the last five months

Worst Performing City

Belfast

↓7.6%

% change YoY

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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