



**Sensormatic
Solutions**

Comprehensive measure of
store customer traffic

Benchmark by UK nations,
location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

April 2024

Period covered:
31 March 2024 – 27 April 2024

Headline commentary



Helen Dickinson OBE | Chief Executive | British Retail Consortium

“While UK footfall was impacted by poor weather last month, this was artificially exacerbated by the comparison with 2023, when Easter was in April. All locations saw declines on the previous month, and nearly all major cities performed similarly poorly. However, there was good news in Edinburgh, where footfall was positive once again owing to the investment in local shopping locations in the Scottish capital over the past few years.

“It is now vital that elected councillors, mayors and Police and Crime Commissioners all play their part in designing the right planning, transport and neighbourhood safety policies to create thriving shopping destinations in communities across the country. These actions, locally and nationally, can contribute to boosting footfall and revitalising retail centres.”



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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

“After an early Easter fuelled improved footfall performance in March, there is little doubt lacklustre levels of store visits in April will have come as a blow for many retailers. Whilst a drop in traffic may have been expected due to Easter falling early and the May bank holiday falling late, this will have been of little consolation. An exceptionally wet April also seems to have dampened many shoppers’ appetite for spending, especially in outlet and outdoor focused retailers. However, with financial pressures starting to ease for some, and indications of growing consumer confidence being reported, we will have to look forward to May to see if that filters through to improved in-store shopping.”

Executive Summary

In April, footfall traffic declined by 7.2% year-on-year (YoY) which showed a significant fall from March, and standing out as the largest decrease in footfall since March 2021. This decline reflected shifts in consumer behaviour, stemming from poor weather but primarily explained by the Easter run-up being in March this year, but April last year. Figures for March and April 2024 combined reports a 4.2% decline year on year, highlighting the extent to which the timing of Easter has impacted the results.

Retail Footfall Index – April 2024

- Footfall fell 7.2% YoY
- Compared to March, footfall fell by 5.9 % points
- Rolling 3-mth average: fell 4.1% YoY
- Compared to previous 3-mth average: fell 1.4 % points

Down 7.2%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- Apr-24: footfall fell 6.9% YoY
- Compared to February: footfall fell by 5.4% points

Down 6.9%
% change YoY

Retail Parks

- Apr-24: footfall fell 6.2% YoY
- Compared to prior month: footfall fell by 2.7% points

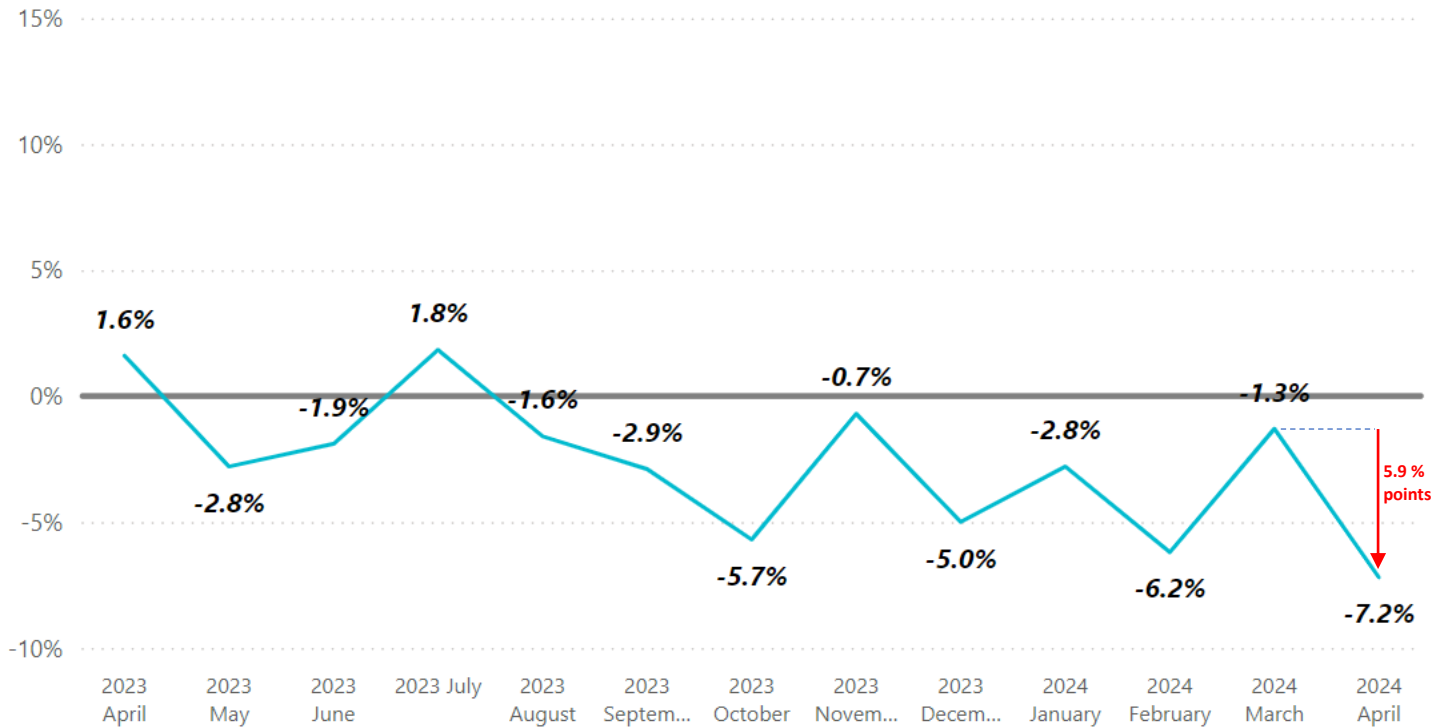
Down 6.2%
% change YoY

Shopping Centres

- Apr-24: footfall fell 7.2% (YoY)
- Compared to prior month: footfall fell by 7.5% points

Down 7.2%
% change YoY

Monthly Total UK Retail Footfall (% Change Year-on-Year)



Slow start to spring as footfall declines

- UK total retail footfall fell by 7.2% year-on-year in April 2024.
- This was a deterioration month-on-month – down by 5.9 percentage points compared to March 2024.
- The key factors that have contributed to footfall performance are:
 - **Weather Conditions:** The wet weather has once again impacted people's willingness to go out, resulting in shoppers visiting fewer stores.
 - **Seasonal Factors:** Due to Easter falling early, April has suffered in terms of footfall due to being compared to April 2023 which would have seen plenty of shoppers out in shops in preparation for the Easter Weekend.

UK Total Retail

Apr-24

Down 7.2%

Year-on-Year

3-month rolling average

Down 4.1%

Year-on-Year

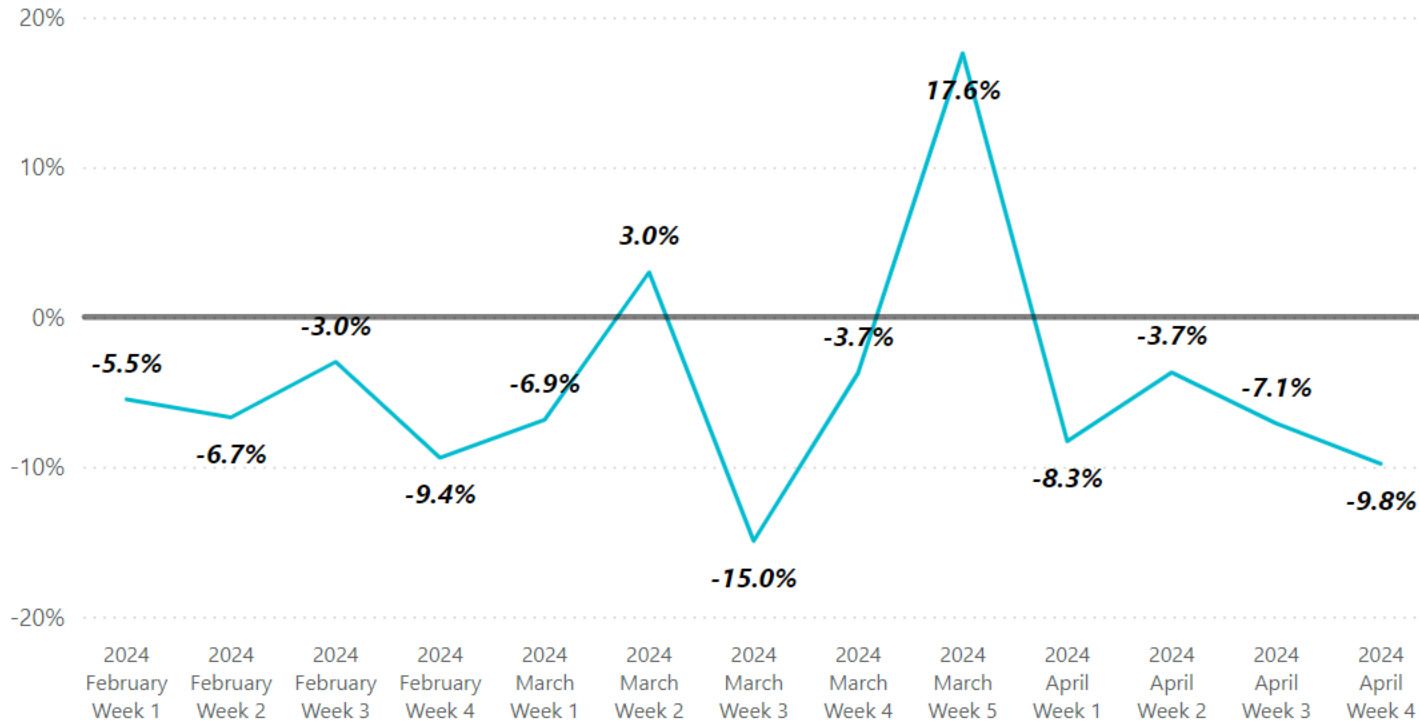
TOTAL FOOTFALL – BY WEEK

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Weekly Total UK Retail Footfall (% Change Year-on-Year)



UK WEEKLY FOOTFALL

- April consists of 4 calendar weeks.
- Footfall is lower for all the four weeks year-on-year compared to last year.
- Overall, April showed a consistent downward trend throughout the month, with each week varying in terms of the severity of the declines
- Week 4 exhibits the most significant decrease followed by Week 1, resulting from key events last year coinciding with these weeks such as Good Friday 2023 and run up to the bank holiday weekend, respectively.
- Week 3 showed a significant albeit lower decline to Weeks 1 and 4 with Week 2 having the smallest decline in April.

BEST PERFORMING WEEK

Week Two

Down 3.7%

Year-on-Year

WORST PERFORMING WEEK

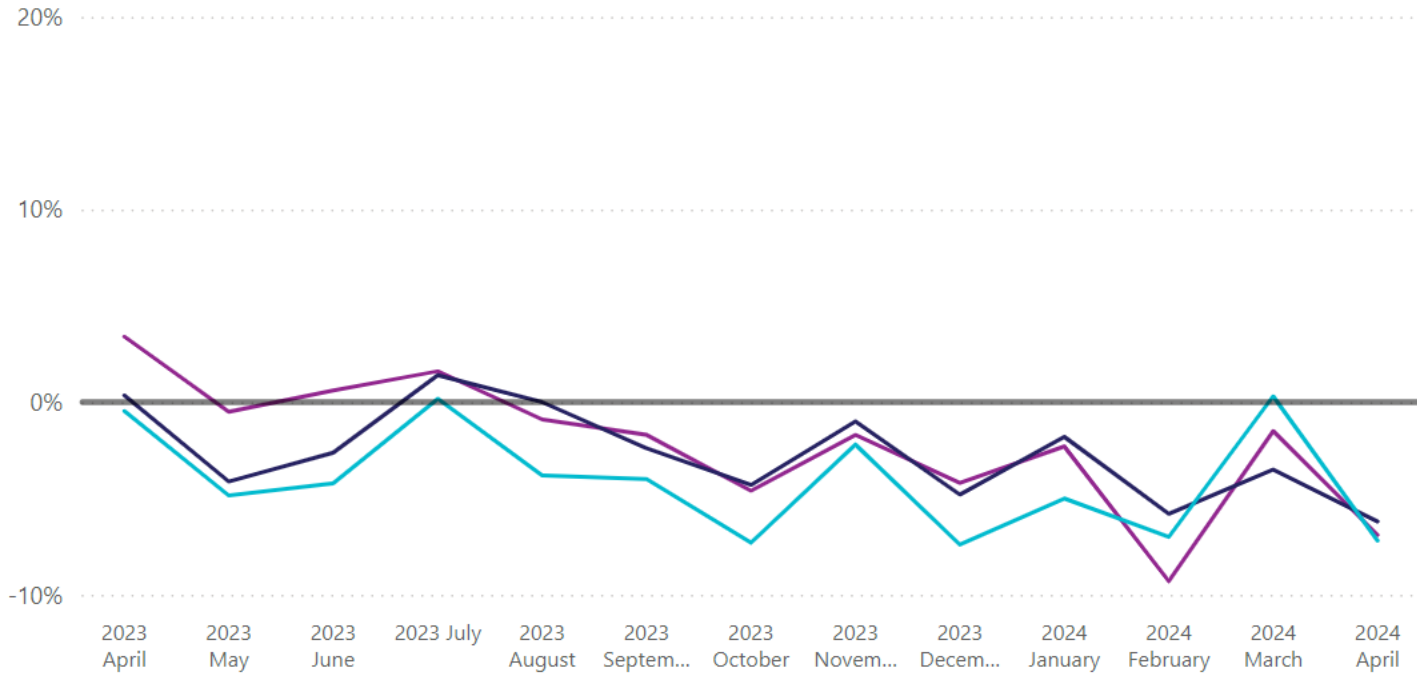
Week Four

Down 9.8%

Year-on-Year

Footfall By Location (% Change Year-on-Year)

● High Street ● Retail Parks ● Shopping Centres



Shopping Centres saw the only YoY rise

- **Shopping Centre:**
 - Footfall fell ↓7.2% YoY
 - Compared to prior month: footfall fell ↓7.5% points
- **High Street:**
 - Footfall fell ↓6.9% YoY
 - Compared to prior month: footfall fell ↓5.4% points
- **Retail Park:**
 - Footfall fell ↓6.2% YoY
 - Compared to prior month: footfall fell ↓2.7% points

Footfall over the last 12 months:

- After seeing a rise in YoY footfall for the first-time since July 2023 last month, Shopping Centres witnessed a YoY fall in footfall, becoming the location with the lowest footfall in April.
- High Street retailers saw a YoY decline in footfall again this month, offsetting slight improvements from last month. This follows a trend of negative footfall YoY since April 2023.
- Retail Parks have followed a similar pattern to High Streets, showing slight improvement last month only to be followed by a steeper decline this month. Both locations have entered negative territory since April 2023 through to this month, with footfall stabilising in July, before resuming a decline into August with occasional monthly improvements.

Shopping Centre

Down 7.2%

Year-on-Year

High Street

Down 6.9%

Year-on-Year

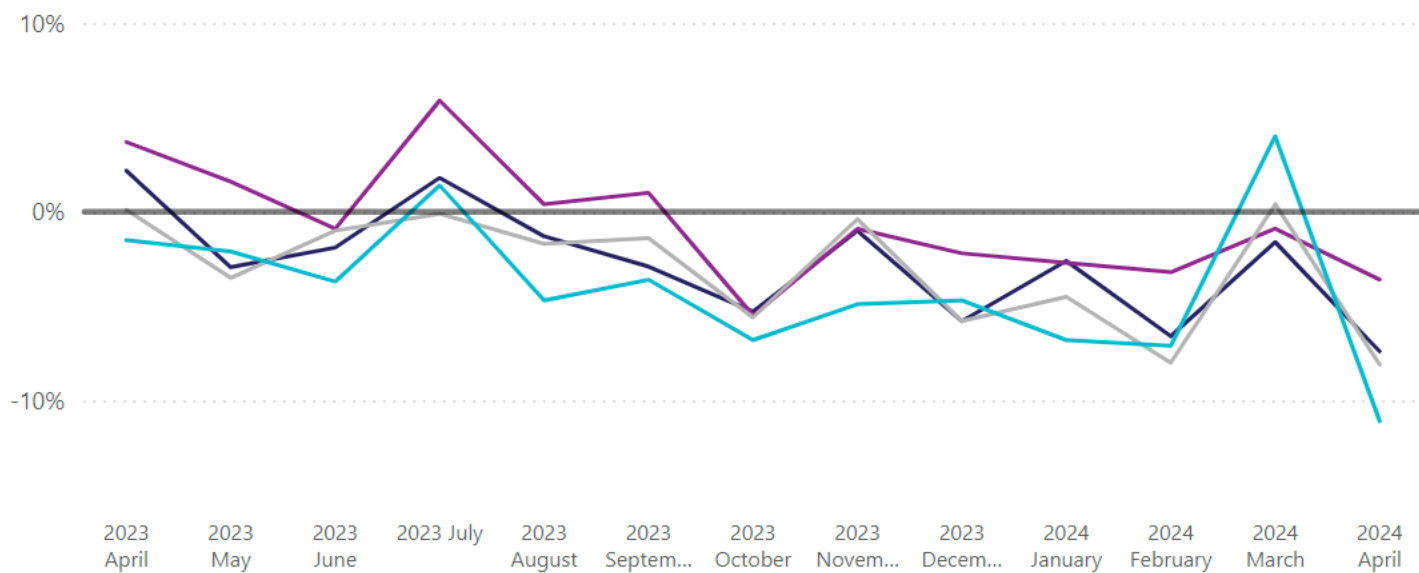
Retail Park

Down 6.2%

Year-on-Year

National Footfall (% Change Year-on-Year)

● England ● Scotland ● Wales ● Northern Ireland



UK NATIONS

Footfall Country
Rank (YoY)

Scotland:

- Apr-24: footfall fell ↓3.6% YoY
- Compared to prior month: footfall fell ↓2.3% points.
- Scotland has returned to first place for the ninth time in twelve months after spending last month in third place

Down 3.6%



England:

- Apr-24: footfall fell ↓7.4% YoY
- Compared to prior month: footfall fell ↓5.8% points.
- Second on the table after falling to bottom last month

Down 7.4%



Wales:

- Apr-24: footfall fell ↓8.1% YoY
- Compared to prior month: footfall fell ↓8.5% points
- Third on the table, falling from second last month

Down 8.1%



Northern Ireland:

- Apr-24: footfall fell ↓11.1% YoY
- Compared to prior month: footfall fell ↓15.1% points.
- Fallen to the bottom for the sixth time in eight months after spending last month at the top.

Down 11.1%



UK FOOTFALL BY ENGLISH REGION

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

English Region	Apr-24	Apr-24 Rank	Mar-24 Rank	Change in Rank
East of England	-4.2%	1	5	↑ 4
North East England	-5.7%	2	7	↑ 5
South West England	-6.3%	3	6	↑ 3
North West England	-6.4%	4	3	↓ -1
London	-7.3%	5	9	↑ 4
Yorkshire and the Humber	-8.4%	6	2	↓ -4
East Midlands	-8.7%	7	4	↓ -3
South East England	-9.3%	8	8	→ 0
West Midlands	-9.6%	9	1	↓ -8

ENGLISH REGIONAL RANKINGS

Highest YoY

- East of England- footfall fell ↓4.2% YoY, rising 4 places to rank first.
- Compared to prior month: footfall fell ↓3.4% points
- First time at the top of the table.

Highest YoY
East of England

Down **4.2%**

Lowest YoY

- West Midlands: footfall fell ↓9.6% YoY, falling 8 places to the lowest rank.
- Compared to prior month: footfall fell ↓10.6% points
- First time at the bottom of the table after spending three of the last six months at the top.

Lowest YoY
West Midlands

Down **9.6%**

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

Cities	Apr-24	Apr-24 Rank	Mar-24 Rank	Change in Rank
Edinburgh	2.3%	1	4	↑ 3
Bristol	-5.1%	2	10	↑ 8
Glasgow	-5.7%	3	8	↑ 5
Liverpool	-6.1%	4	2	↓ -2
Leeds	-6.2%	5	3	↓ -2
Manchester	-6.3%	6	7	↑ 1
London	-7.3%	7	9	↑ 2
Birmingham	-10.0%	8	5	↓ -3
Belfast	-10.7%	9	1	↓ -8
Nottingham	-12.4%	10	11	↑ 1
Cardiff	-13.2%	11	6	↓ -5

UK CITIES RANKINGS

Major Cities:

- Major City Average: ↓7.3% YoY
- Compared to prior month: average fell ↓7.7% points.
- City average once again in negative YoY territory for eighth time in ten months (since July 2023).

City: Best YoY change

- Edinburgh - improved ↑2.3% YoY
- Compared to prior month: footfall fell ↓0.6% points
- Strongest monthly performance thirteen out of the sixteen months of 2023

City: Worst YoY change

- Cardiff - fell ↓13.2% YoY
- Compared to prior month: footfall fell ↓13.5% points
- First time weakest YoY monthly performance since Oct-22

Best YoY Improvement

Edinburgh

Up **2.3%**Worst YoY Fall

Cardiff

Down **13.2%**

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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