



**Sensormatic  
Solutions**

Comprehensive measure of  
store customer traffic

Benchmark by UK nations,  
location type and major cities

# **BRC-SENSORMATIC IQ FOOTFALL MONITOR**

**January 2024**

Period covered:  
31 December 2023 – 27 January 2024

# Headline commentary



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

“Footfall remained on a downward trajectory in January, albeit at a slower rate than in December. Many consumers appear particularly bargain-focused, with the first half of the month boosted by the January sales. However, the latter part of January saw fewer shoppers out as stormy weather led to a bigger footfall decline in Shopping Centres and High Streets.

“Retail plays a vital part in every community across the country – providing the goods that we need, as well as local jobs and investment. As we move towards a higher skilled, digitally transformed, net zero future, there is a need for more investment in every part of the UK. It is vital the next Government finds ways to unlock the full potential of the retail industry, increasing the investment needed to boost local and national economic growth.”



**Sensormatic  
Solutions**

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

“With disruption from two named storms in January dampening footfall on the High Street, retailers also faced tempestuous trading conditions caused by the ongoing cost-of-living spending squeeze and stubbornly sticky inflation. Despite January’s shopper traffic levels remaining down, this was an improved year-on-year performance when compared to December, which - while marginal - may signal the beginning of a bounce back, giving retailers cause for cautious optimism for a recovery. Many will be hoping as inflation continues to slow, consumer confidence will start to rise enough to loosen the squeeze on incomes to the point that this begins to materially translate into both footfall and sales.”

# Executive Summary

With declines observed in several months throughout 2023, January emerged as a continuation of the downward trend, albeit with a more moderate pace compared to the sharper decrease seen in December 2023. The data suggests that retail footfall faced challenges, with January marking a notable phase in the ongoing trend of adjusting consumer visits to retail establishments.

## Total Retail Footfall Index

**Down 2.8%**  
% change YoY

- Jan-24: footfall fell **↓2.8%** (YoY)
- Compared to prior month: footfall improved **↑2.2%** points
- Rolling 3-mth average: fell **↓3.1%** (YoY)
- Compared to prior 3-mth avg : improved **↑ 0.7%** points

### BY SHOPPING LOCATION:

#### High Street Footfall:

**Down 2.3%**  
% change YoY

- Jan-24: footfall fell **↓2.3%** (YoY)
- Compared to prior month: footfall improved **↑1.9%** points

#### Retail Park Footfall:

**Down 1.8%**  
% change YoY

- Jan-24: footfall fell **↓1.8%** (YoY)
- Compared to prior month: footfall improved **↑3.0%** points

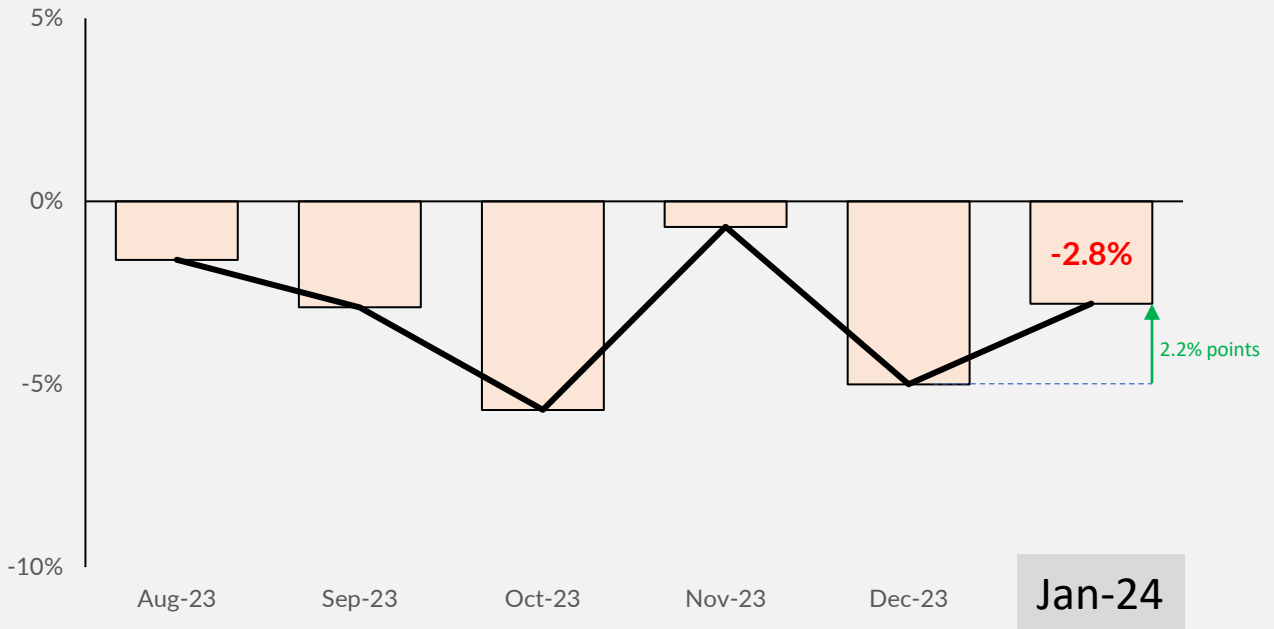
#### Shopping Centre Footfall

**Down 5.0%**  
% change YoY

- Jan-24: footfall fell **↓5.0%** (YoY)
- Compared to prior month: footfall improved **↑2.4%** points

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

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



## New year, same story for Retail Footfall

- In **January 2024**, there was a **2.8% fall in UK total retail footfall** compared to January 2023.
- However, there was an **improvement of 2.2% points** when compared to **Dec-23 footfall**.
- The 2.8% YoY drop can be attributed to:
  - **Weather Conditions:** the UK experienced the impact of two consecutive storms in January, Storm Isha and Storm Jocelyn.
  - **Economic Factors:** due to the persistent strain on household budgets caused by the ongoing cost-of-living spending squeeze, coupled with the challenge of navigating through stubbornly high and unyielding inflationary trends.

UK Total Retail

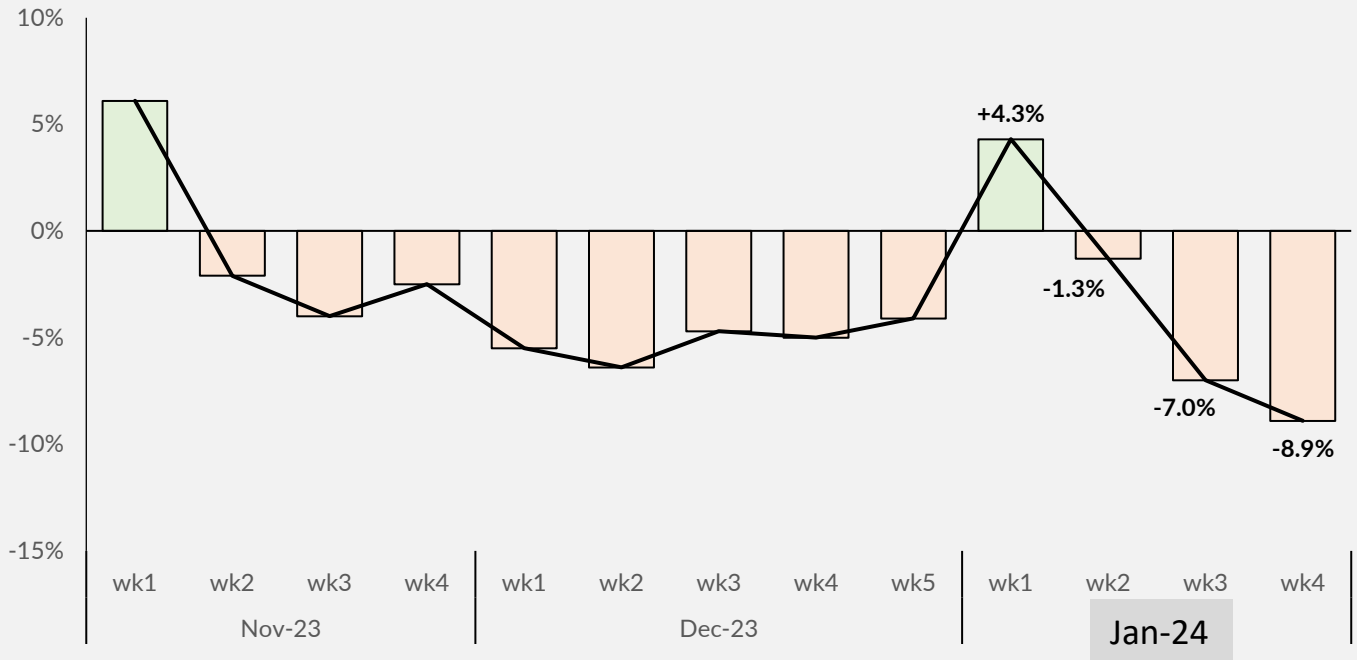
Jan 2024

**Down 2.8%**  
Year-on-Year

3-month rolling avg

**Down 3.1%**  
Year-on-Year

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



## JANUARY 2024 UK WEEKLY FOOTFALL

- January consists of 4 calendar weeks.
- Footfall is lower for three out of the four weeks compared to last year.
- January witnessed a favourable YoY increase in footfall during the initial week, attributed to the January Sales and in contrast to the subdued performance observed in December.
- Nevertheless, footfall turned negative on a YoY basis for the subsequent three weeks. This decline was primarily influenced by adverse weather conditions in the latter part of January, resulting in a more pronounced reduction in footfall.

Most significant improvement in footfall

Jan-24: Week One

Up **4.3%**

Year-on-Year

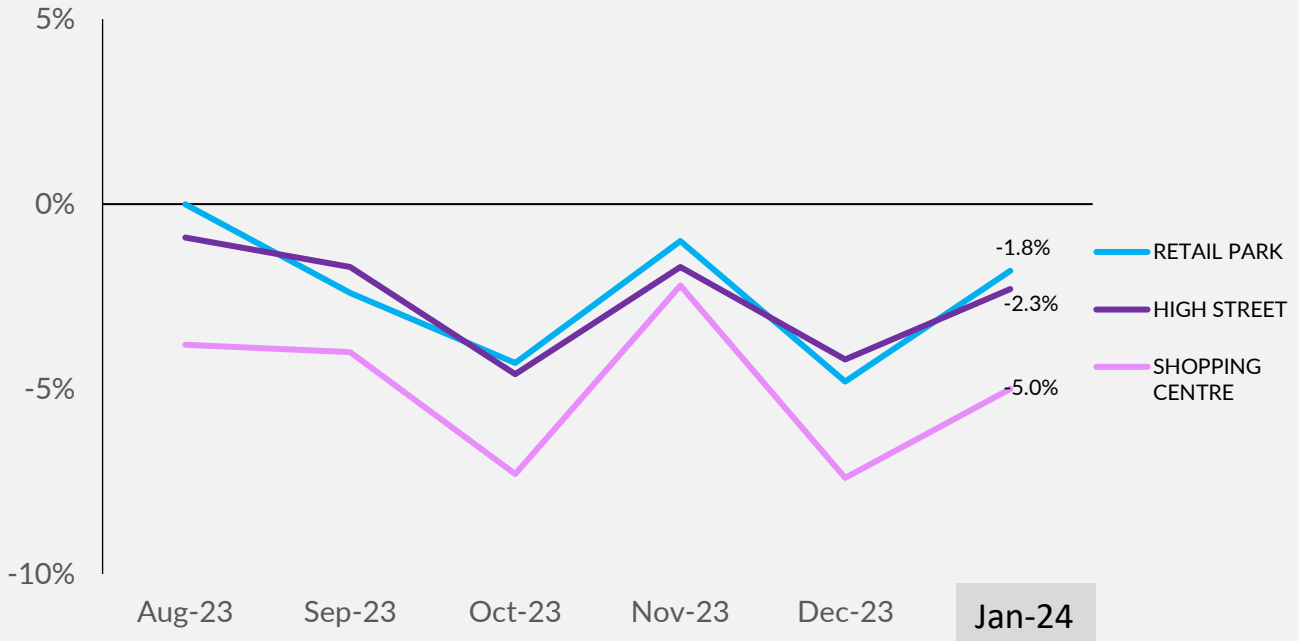
Most significant drop in footfall

Jan-24: Week Four

Down **8.9%**

Year-on-Year

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



## Jan-24: Retail Parks saw the smallest YoY drop

- **Retail Park:**
  - Jan-24: footfall fell ↓1.8% (YoY)
  - Compared to prior month: footfall improved ↑3.0% points
- **High Street:**
  - Jan-24: footfall fell ↓2.3% (YoY)
  - Compared to prior month: footfall improved ↑1.9% points
- **Shopping Centre:**
  - Jan-24: fell ↓5.0% (YoY)
  - Compared to prior month: footfall improved ↑2.4% points

## Last 6 months:

- High Street retailers saw a consistent YoY decline in footfall from August 2023 to January 2024, with notable drops in September and October. Although January showed a less severe decline, suggesting potential stabilization, overall foot traffic remained negative.
- Retail Parks experienced fluctuating year-on-year footfall, stabilizing in August, declining notably in October, and recovering slightly in November. January showed a less severe decline than December.
- Shopping Centres witnessed a consistent and substantial year-on-year decline in footfall from August 2023 to January 2024, with notable drops in September, October, and December. Despite an improvement in January, the overall trend indicates a persistent reduction in retail traffic at Shopping Centres during this period.

## Retail Park

Down **1.8%**

Year-on-Year

## High Street

Down **2.3%**

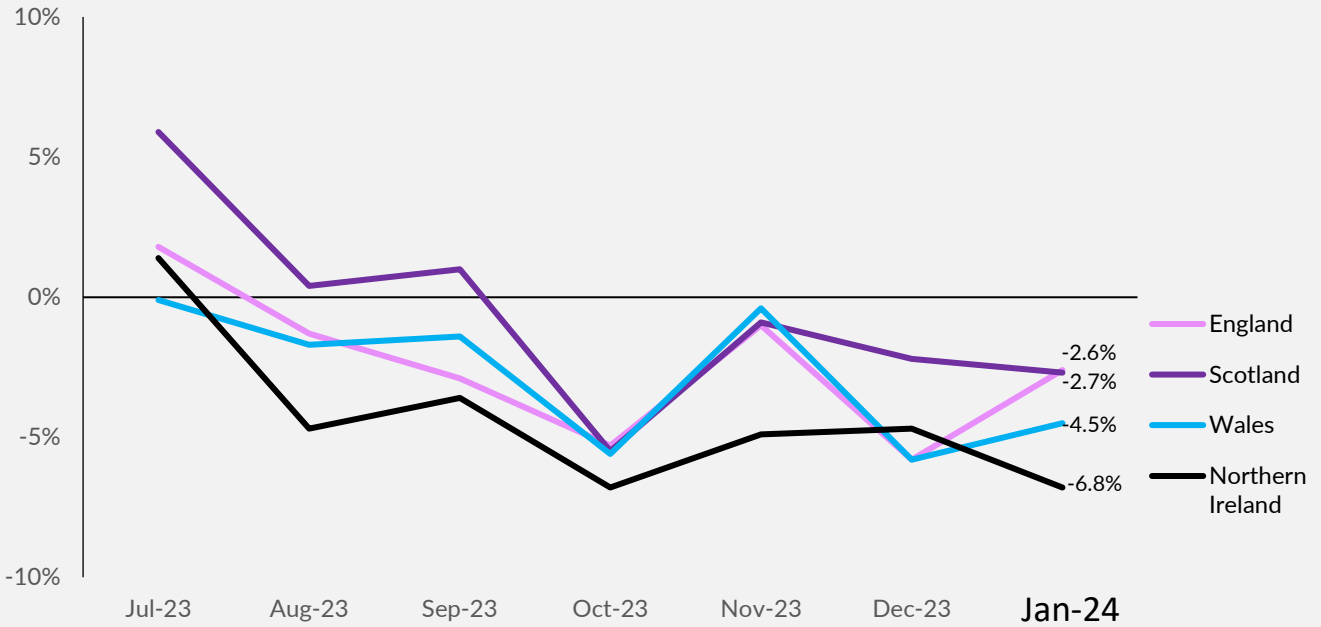
Year-on-Year

## Shopping Centre

Down **5.0%**

Year-on-Year

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



## UK Nations

## Jan-24 vs Jan-23

## England:

- Jan-24: footfall fell ↓2.6% (YoY)
- Compared to prior month: footfall improved ↑3.2% points
- First time at the top of the table since Oct-23

Down 2.6%



## Scotland:

- Jan-24: footfall fell ↓2.7% (YoY)
- Compared to prior month: footfall fell ↓0.5% points
- Only third time Scotland has not topped the table in the last 16 months

Down 2.7%



## Wales:

- Jan-24: footfall fell ↓4.5% (YoY)
- Compared to prior month: footfall improved ↑1.3% points
- Although YoY footfall fell, stronger compared to last month

Down 4.5%



## Northern Ireland:

- Jan-24: footfall fell ↓6.8% (YoY)
- Compared to prior month: footfall fell ↓2.1% points
- Bottom of the table for five out of the last 6 months

Down 6.8%



# UK FOOTFALL BY ENGLISH REGION

BRC - Sensormatic IQ Footfall Monitor



Sensormatic  
Solutions

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

Jan-24	England Region	Change in Rank	Jan-24 rank	Dec-23 rank
-1.0%	West Midlands	6 ↑	1	7
-1.3%	South West England	0 →	2	2
-1.7%	London	-2 ↓	3	1
-2.2%	East Midlands	2 ↑	4	6
-2.6%	Yorkshire and the Humber	0 →	5	5
-2.8%	North West England	2 ↑	6	8
-2.9%	East of England	-3 ↓	7	4
-3.8%	South East England	-5 ↓	8	3
-6.0%	North East England	0 →	9	9

## ENGLAND REGIONAL BREAKDOWN

### Jan-24: Smallest YoY drop

- West Midlands
- Jan-24: footfall fell ↓1.0% (YoY)
- Compared to prior month: footfall improved ↑5.3% points
- Second time in the last three months to top the table

### Jan-24: Largest YoY drop

- North East England
- Dec-23: footfall fell ↓6.0% (YoY)
- Compared to prior month: footfall improved ↑2.8% points
- Worst-performing region third consecutive month

### Most significant climb in Jan-24 ranking table

- West Midlands
- ↑6 spots, from position 7 to top of the table

### Most significant drop in Jan-24 ranking table

- SE England
- ↓5 spots, from position 3 to position 8

### Jan-24: Smallest YoY Drop

West Midlands  
Down **1.0%**

### Jan-24: Largest YoY Drop

NE England  
Down **6.0%**



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

Jan-24	City	Change in Rank	Jan-24 rank	Dec-23 rank
+3.2%	Edinburgh	0 →	1	1
+1.5%	Leeds	0 →	2	2
+1.5%	Liverpool	4 ↑	2	6
-1.7%	London	1 ↓	4	3
-2.6%	Birmingham	0 →	5	5
-2.8%	Manchester	4 ↑	6	10
-2.9%	Bristol	0 →	7	7
-4.6%	Cardiff	1 ↑	8	9
-5.3%	Belfast	5 ↓	9	4
-5.5%	Nottingham	2 ↓	10	8
-7.0%	Glasgow	0 →	11	11

## CITY TRACKER

Major Cities:

- Jan-24 average: ↓2.4% (YoY)
- Compared to prior month: average improved ↑2.6% points
- City average in negative YoY territory for eight out of the last nine months

City: Strongest YoY

- Edinburgh
- Jan-24: improved ↑3.2% (YoY)
- Compared to prior month: footfall fell ↓0.5% points
- Nine consecutive months strongest YoY monthly performance

City: Weakest YoY

- Glasgow
- Jan-23 fell ↓7.0% (YoY)
- Compared to prior month: footfall fell ↓2.6% points
- Second consecutive month weakest YoY monthly performance

Jan-24: Best YoY Improvement

Edinburgh

Up 3.2%

Jan-24: Largest YoY Drop

Glasgow

Down 7.0%

## 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.

### AUTHOR



**ASIM DEY**  
Analyst

### EDITOR



**DR KRIS HAMER**  
Director of Insight

BRC member enquiries

Please email: [insight@brc.org.uk](mailto:insight@brc.org.uk)

### Media ENQUIRIES

#### BRC Press Office

Tom Holder

T: +44 (0)20 7854 8924

M: +44 (0)7772 382 432

[tom.holder@brc.org.uk](mailto:tom.holder@brc.org.uk) / [media@brc.org.uk](mailto:media@brc.org.uk)

#### Sensormatic Solutions Press Office

Katarzyna Breczko

Marketing Director EMEA Retail

T: +49 173 7070 562

[katarzyna.breczko@jci.com](mailto:katarzyna.breczko@jci.com)