Sensormatic Solutions

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

September 2023

Period covered:
27 August – 30 September 2023

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"During the warmer-than-expected weather, footfall slowed in September, with fewer shoppers across all shopping locations. High streets and retail parks held up slightly better as the return to school helped increase the number of shopping visits at the start of the month. Retailers will want to invest in their properties in the run up to Christmas, but the prospect of a £400m increase to business rates next year will limit their capacity for improvements. The Chancellor should announce a freeze to rates at the Autumn Budget in November."

Sensormatic Solutions

Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"Rather than the traditional 'Back To School' boost to shopper traffic we would normally expect to see in September, footfall remained subdued as consumer caution on discretionary spending stayed high, perhaps prompted by shoppers withholding spend to save ahead of the Golden Quarter and Christmas. While retailers will be hoping this month's first fall in food prices in two years will mark the beginning of the end of inflationary-driven pressure on household budgets, many will recognise that the reality of inflationary-driven interest rates – and consequently higher mortgages and rent payments - will be with us 'higher and for longer', meaning once again retailers will be required to run faster just to stand still."

Executive Summary

Retail footfall in 2023 has exhibited a fluctuating pattern, starting positively in January and February but gradually declining from March to April. May brought a significant shift with a sharp decrease, due to rising inflation and consumer expectations of price hikes. Footfall remained relatively stable with minor fluctuations from June to August, and July saw a minor recovery due to summer sales. However, August and September both witnessed declines, highlighting persistent economic challenges and consumer prudence in spending.

Total Retail Footfall Index

- Sep-23: fell ↓2.9% (YoY)
- Compared to Aug-23 YoY change: fell ↓1.3% points
- Rolling 3-mth average: improved ↑0.1% points

↓2.9%

% change YoY

BY SHOPPING LOCATION:

High Street Footfall:

- Sep-23: fell ↓1.7% (YoY)
- Compared to Aug-23 YoY change: fell ↓**0.8**% points

↓1.7%

% change YoY

Retail Park Footfall:

- Sep-23: fell ↓2.4% (YoY)
- Compared to Aug-23 YoY change: fell ↓**2**.4% points

↓2.4%

% change YoY

Shopping Centre Footfall

- Sep-23: fell ↓**4.0**% (YoY)
- Compared to Aug-23 YoY change: fell ↓**0.2**% points

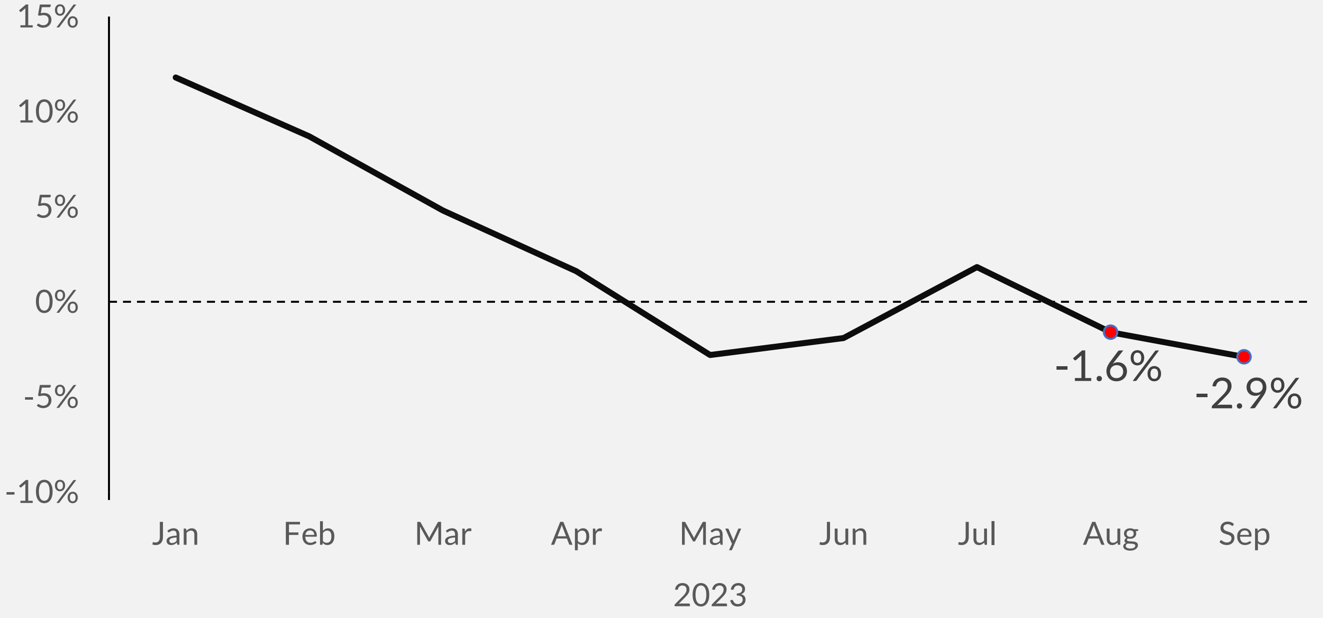
↓4.0%

% change YoY

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

BRC Sensormatic Solutions

TOTAL UK FOOTFALL (% CHANGE YEAR-ON-YEAR)



September Footfall Remains Subdued

- In September 2023, there was a 2.9% fall in UK total retail footfall compared to September last year.
- There was a drop of 1.3% points when compared to Aug-23 YoY fall of 1.6%.
- This decrease can be attributed to:
    - **Back-to-School Timing:** While there is usually an increase in shopping for back-to-school supplies and clothing in September, this boost was not as significant as in previous years.
    - **Seasonal Shifts**: In September, summer transitions to autumn, Nonetheless, the year experienced higher temperatures than the norm, reducing the necessity for individuals to shop for autumnal clothing etc.

Sep 2023

↓2.9%

Year-on-Year

12-month rolling avg

↑3.1%

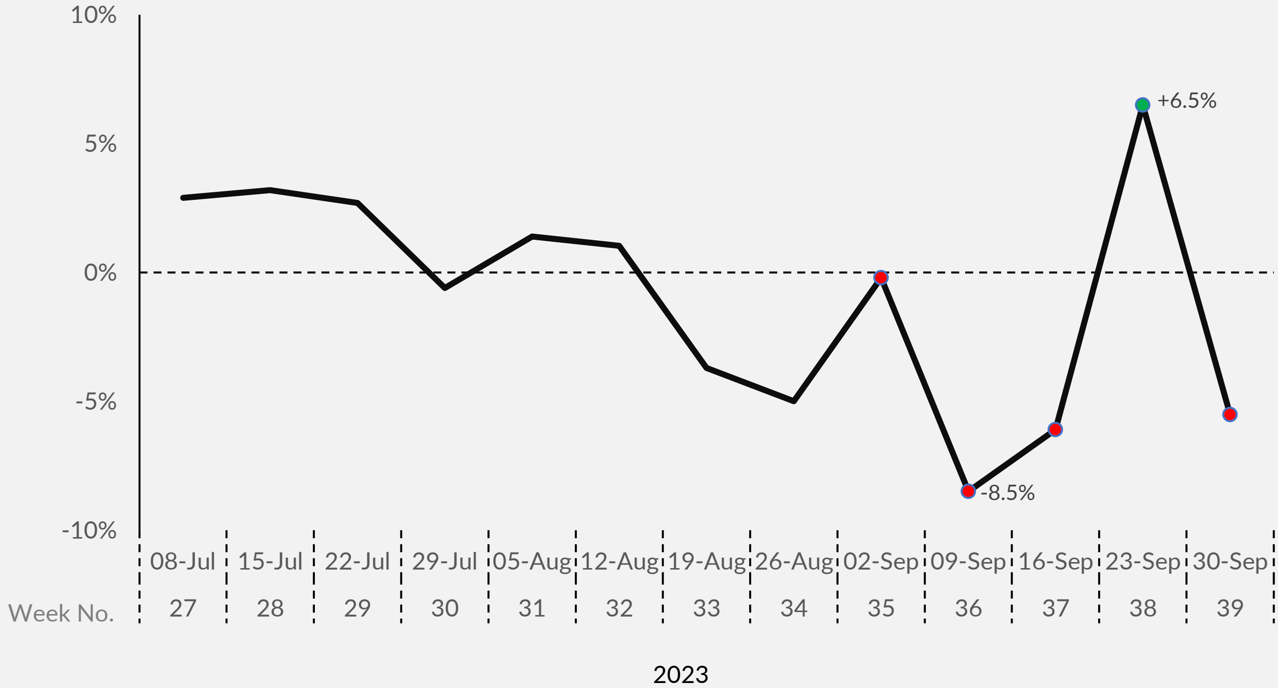
Year-on-Year

TOTAL FOOTFALL – BY WEEK

BRC - Sensormatic IQ Footfall Monitor

BRC Sensormatic Solutions

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



SEPTEMBER 2023 UK WEEKLY FOOTFALL

- September consists of 5 weeks.
- Footfall is lower for four out of the five weeks compared to last year.
- In the fourth week of September (wk 38), there was a notable YoY change, which was 6.5 percentage points higher than footfall observed during the same week in the previous year. This increase can be attributed to the bank holiday in 2022, which was held in observance of the Queen's funeral.
- Overall, the data underscores the sensitivity of retail trends to external factors, urging retailers to adapt their strategies and policymakers to support the sector during uncertain times.

Fourth week of Sep-23 (week no. 38)

↑ **6.5%**

Year-on-Year

Second week of Sep-23 (week no. 36)

↓ **8.5%**

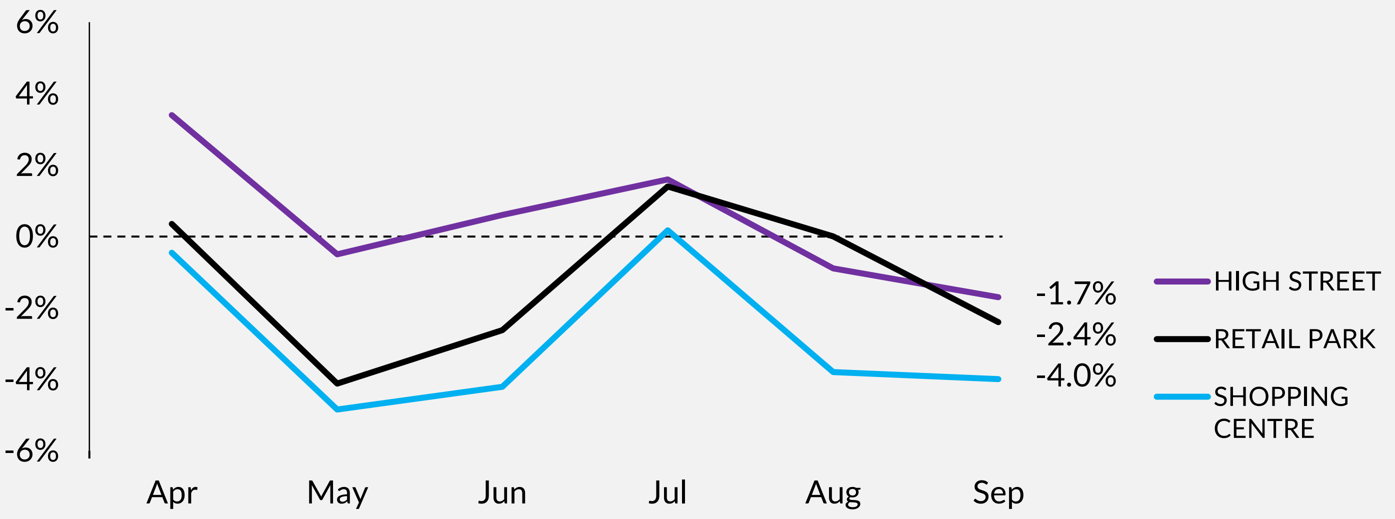
Year-on-Year

FOOTFALL BY RETAIL LOCATION

BRC - Sensormatic IQ Footfall Monitor

BRC Sensormatic Solutions

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



Sep-23: High Street outperforms other 2 locations

- **High Street footfall**
    - **Sep-23: fell ↓1.7% (YoY)**
    - Compared to Aug-23 YoY change: fell ↓0.8% points
- **Retail Park footfall**
    - **Sep-23: fell ↓2.4% (YoY)**
    - Compared to Aug-23 YoY change: fell ↓2.4% points
- **Shopping Centre footfall**
    - **Sep-23: fell ↓4.0% (YoY)**
    - Compared to Aug-23 YoY change: fell ↓0.2% points

2023 thus far:

- Footfall in Retail Parks exhibited strong YoY declines overall, marked by consistent but modest changes in January and February, followed by fluctuations, including a slight YoY dip in May and June, and concluding with a stabilization in August and a decline in September.
- High Street footfall fluctuated less, with significant positive changes in January and February, followed by occasional dips in the subsequent months, including a slight YoY decline in August and a more pronounced one in September.
- Footfall in Shopping Centres similarly experienced robust growth in January and February but proceeded to undergo fluctuating YoY declines in the subsequent months, persisting from March through September.

High Street

↓1.7%

Year-on-Year

Retail Park

↓2.4%

Year-on-Year

Shopping Centre

↓4.0%

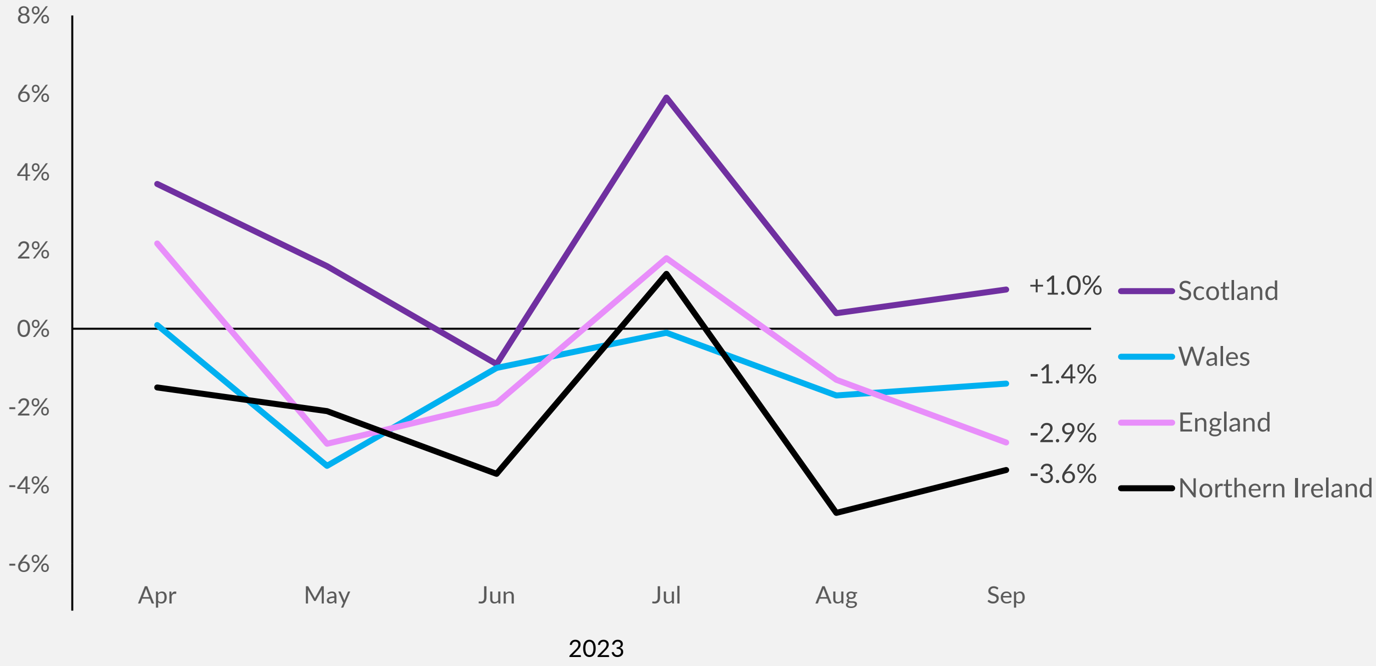
Year-on-Year

UK TOTAL FOOTFALL BY REGION

BRC - Sensormatic IQ Footfall Monitor

Sensormatic Solutions

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



UK Nations

vs Sep 2022

Scotland Footfall:

- **Sep-23: improved ↑1.0% (YoY)**
- Compared to Aug-23 YoY change: improved ↑0.6% points
- Strongest growth of all the UK's nations
- Scotland has seen the strongest national YoY growth for every month this year (Jan-Sep)

↑1.0%

Wales Footfall:

- **Sep-23: fell ↓1.4% (YoY)**
- Compared to Aug-23 YoY change: improved ↑0.4% points
- Fifth consecutive month in negative YoY territory

↓1.4%

England Footfall:

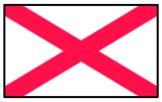
- **Sep-23: fell ↓2.9% (YoY)**
- Compared to Aug-23 YoY change: fell ↓1.6% points
- Joint weakest England monthly YoY change seen this year

↓2.9%

Northern Ireland Footfall:

- **Sep-23: fell ↓3.6% (YoY)**
- Compared to Aug-23 YoY change: improved ↑1.1% points
- Weakest recovery of all the UK's nations
- Strongest % point improvement compared to last month

↓3.6%



UK FOOTFALL BY ENGLISH REGION

BRC - Sensormatic IQ Footfall Monitor

BRC Sensormatic Solutions

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

Rank	English Region	Sep-23	Rank vs Aug-23
1	North East England	-0.5%	+1
2	London	-0.9%	-1
3	North West England	-2.5%	-
4	East Midlands	-3.1%	+2
4	West Midlands	-3.1%	+2
6	South East England	-3.7%	-1
7	South West England	-4.3%	-3
8	Yorkshire and the Humber	-5.7%	-
9	East of England	-7.3%	-

ENGLAND REGIONAL BREAKDOWN

Strongest footfall performance this month

- **North East England**
- **Sep-23: fell ↓0.5% (YoY)**
- Compared to Aug-23 YoY change: fell ↓1.5% points
- Strongest performing region for two out of the last three months

Weakest footfall performance this month

- **East of England**
- **Sep-23: fell ↓7.3% (YoY)**
- Compared to Aug-23 YoY change: fell ↓1.9% points
- Worst-performing region for second consecutive month

Most significant climb in the ranking table this month

- **East Midlands**
- ↑2 spots, from joint position 6 to joint position 4
- **West Midlands**
- ↑2 spots, from joint position 6 to joint position 4

Most significant drop in the ranking table this month

- **South West England**
- ↓3 spots, from position 4 to 7

Best Performing Region

↓0.5%

North East England

Worst Performing Region

↓7.3%

East of England

UK FOOTFALL BY CITY

BRC - Sensormatic IQ Footfall Monitor

BRC
Sensormatic Solutions

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

Rank	City	Sep-23	Rank vs Aug-23
1	Edinburgh	+7.5%	-
2	Liverpool	+3.4%	-
3	London	-0.9%	-
4	Manchester	-1.4%	-
5	Cardiff	-2.0%	+2
6	Bristol	-2.6%	-1
7	Glasgow	-2.9%	+1
8	Belfast	-3.9%	+3
9	Birmingham	-4.3%	-
10	Nottingham	-4.6%	-
11	Leeds	-5.4%	-5

CITY TRACKER

Major Cities:

- **Sep-23: YoY average change: -1.6%**
- Compared to Aug-23 average change: fell ↓0.7% points
- City average in negative YoY territory for four out of the last five months

Best Performing City:

- **Edinburgh**
- **Sep-23: improved ↑ 7.5% (YoY)**
- Compared to Aug-23 YoY change: improved ↑1.8% points
- Strongest monthly performance for eight out of the last nine months

Best Performing City

↑7.5%

Edinburgh

Worst Performing City:

- **Leeds**
- **Sep-23 fell ↓5.4% (YoY)**
- Compared to Aug-23 YoY change: fell ↓4.4% points
- Weakest monthly performance for the first time since Mar-23

Worst Performing City

↓5.4%

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.

AUTHOR

ASIM DEY
Analyst

EDITOR

DR KRIS HAMER
Director of Insight

BRC MEMBER ENQUIRIES

Please email: 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 / media@brc.org.uk

Sensormatic Solutions Press Office
Katarzyna Breczko
Marketing Director EMEA Retail
T: +49 173 7070 562
katarzyna.breczko@jci.com