BRC

Sensormatic Solutions

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

May 2024

Period covered:
28 April 2024 – 25 May 2024

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"UK footfall declined in May, as bank holidays and improving weather failed to entice customers to make in person trips to shopping destinations. All locations did improve on the previous month while Birmingham performed best out of the major cities, showing a positive footfall trend. Retailers will be hopeful that a warm summer, coupled with events such as the European Championships and Olympics, will boost footfall across all major shopping destinations across the UK.

"With an election only five weeks away, political parties have a role to play too by having policies that mean retailers can invest in rejuvenating shopping destinations across the UK. A broken business rates system and outdated planning laws are holding back the industry - politicians of all stripes must address these issues. This will boost economic growth, lift consumer spirits, and help drive more shoppers back to our high streets and other retail destinations."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

"Retailers were dealt some good news in May, as footfall recovered against the month before. While no one's denying this improvement is starting from a low base following a gloomy performance in April, many will be hoping that this represents a turning point. And, with inflationary pressures easing and household budgets starting to feel a little less squeezed, along with the optimism that may come with the general election in July, many may be hoping the mood music has shifted key into something more positive. With lots of opportunities to engage shoppers and benefit from ambient trade from forthcoming major events over the summer, such as the Euros and Olympics, retailers may have just cause for cautious optimism that consumers will vote with their feet and head back to the shops in greater numbers."

Executive Summary

In May, footfall traffic declined by 3.6% year-on-year (YoY) which showed a clear improvement from April, albeit a continuation of the downward trend which started in March 2023. Bank holidays and improving weather were not enough to offset the decline of footfall in May, emphasising the challenges that retail footfall is currently facing. However, the improvement from April may suggest changing fortunes which retailers hope will continue into the summer months.

Retail Footfall Index – May 2024

- Footfall fell **3.6%** YoY
- Compared to April, footfall rose by **3.6%** points
- Rolling 3-mth average: fell **4.0%** YoY
- Compared to previous 3-mth average: rose 0.1% points

Down **3.6%**

% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- May-24: footfall fell **2.7%** YoY
- Compared to April: footfall rose by **4.2%** points

Down **2.7%**

% change YoY

Retail Parks

- May-24: footfall fell **2.3%** YoY
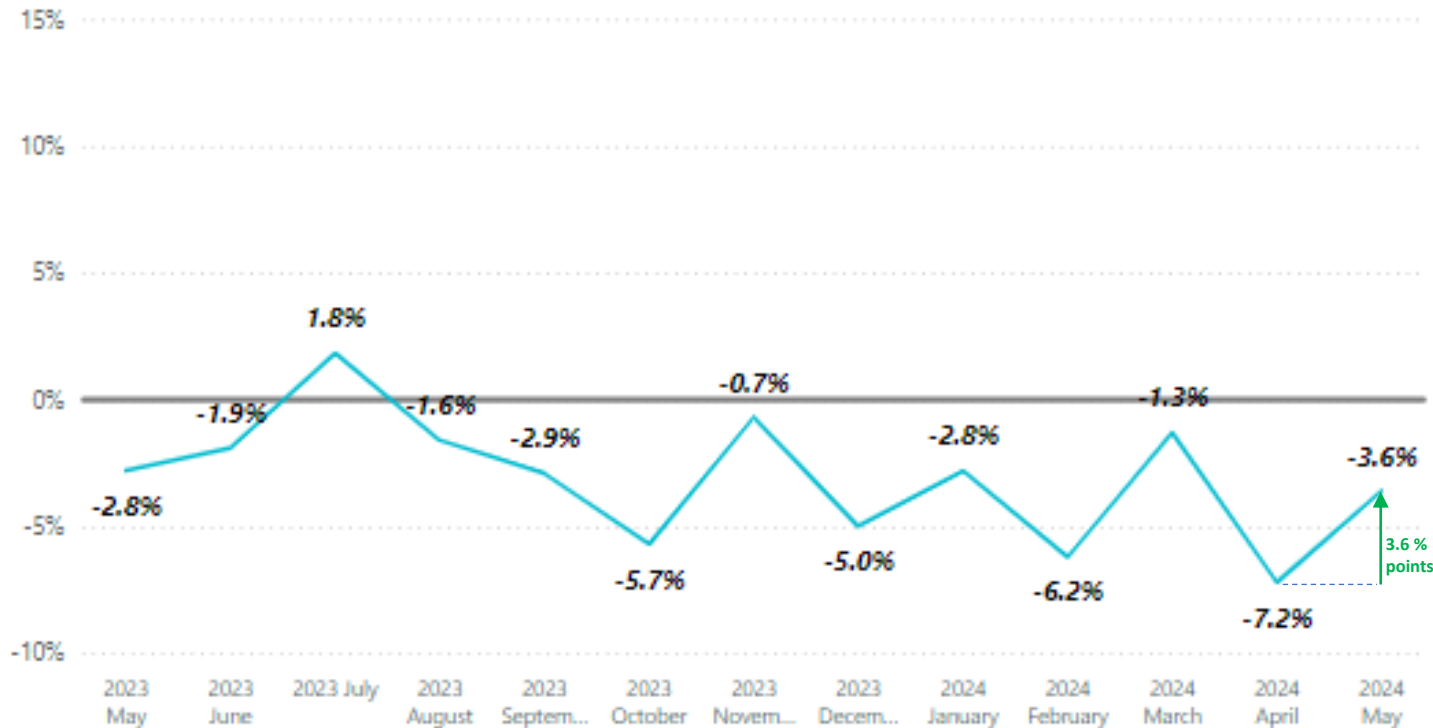- Compared to prior month: footfall rose by **3.9%** points

Down **2.3%**

% change YoY

Shopping Centres

- May-24: footfall fell **4.5%** YoY
- Compared to prior month: footfall rose by **2.7%** points

Down **4.5%**

% change YoY

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

2023 May	-2.8%	
2023 June	-1.9%	
2023 July	1.8%	
2023 August	-1.6%	
2023 September	-2.9%	
2023 October	-5.7%	
2023 November	-0.7%	
2023 December	-5.0%	
2024 January	-2.8%	
2024 February	-6.2%	
2024 March	-1.3%	
2024 April	-7.2%	
2024 May	-3.6%	3.6 % points

Parties must produce plans to revitalise footfall across the UK

- **UK total retail footfall fell by 3.6% year-on-year** in May 2024.

- This was an improvement month-on-month – up by **3.6 percentage points** compared to **April 2024**.

- The key factors that have contributed to footfall performance are:

  - **Train Strikes:** This resulted in fewer shoppers visiting stores.

  - **Seasonal Factors:** Good weather and three bank holidays last year in May, which included the King's Coronation as opposed to two bank holidays this year, enabled shoppers to spend more time outside visiting high streets and shopping centres allowing for higher footfall last May.

UK Total Retail

May-24
Down 3.6%
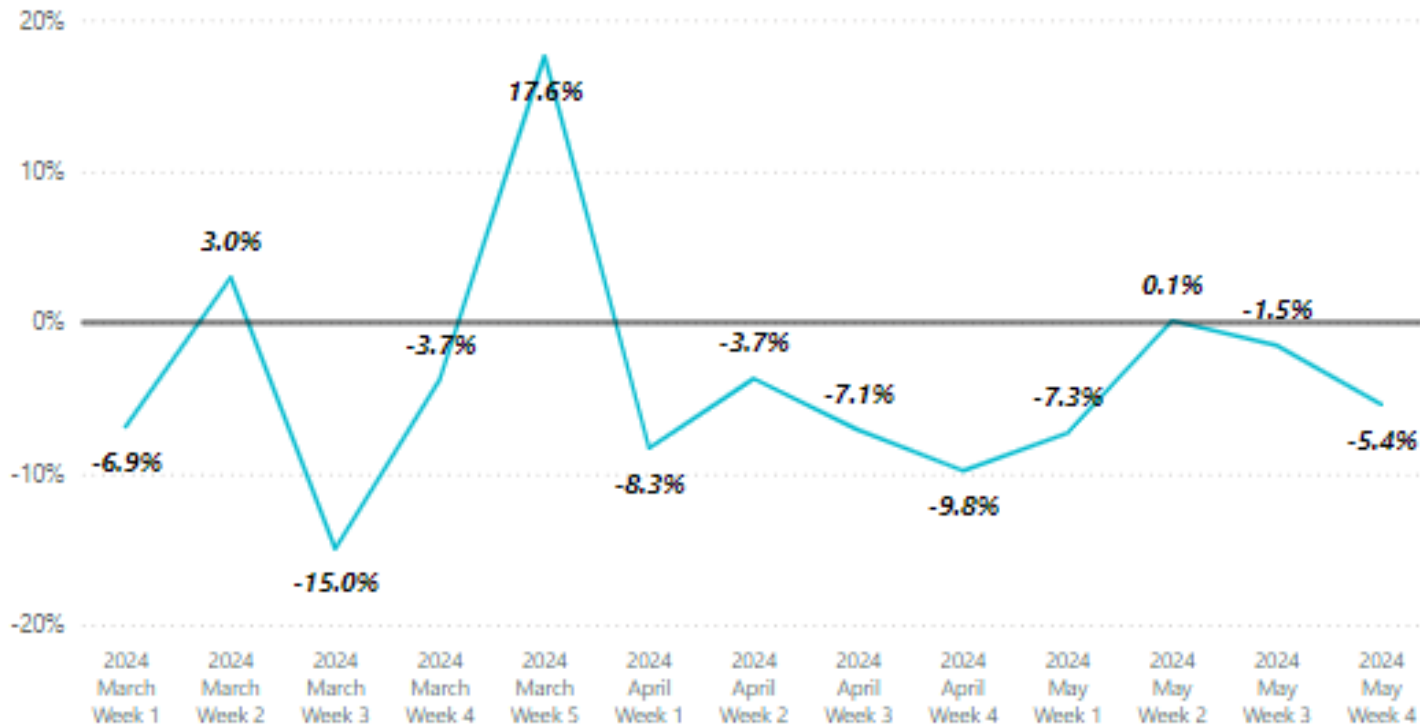Year-on-Year

3-month rolling average
Down 4.0%
Year-on-Year

TOTAL FOOTFALL – BY WEEK
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Weekly Total UK Retail Footfall (% Change Year-on-Year)

UK WEEKLY FOOTFALL

- May consists of 4 calendar weeks.

- Footfall is lower for three of the four weeks year-on-year compared to last year.

- Overall, May showed a consistent downward trend throughout the month, with Week 2 showing a very slight YOY increase.

- Week 1 exhibited the most significant decrease following on from poor footfall in the final week in April. This decrease was followed closely by Week 4

- Week 3 showed a less severe decline compared to Week 1 and Week 4

BEST PERFORMING WEEK

Week Two
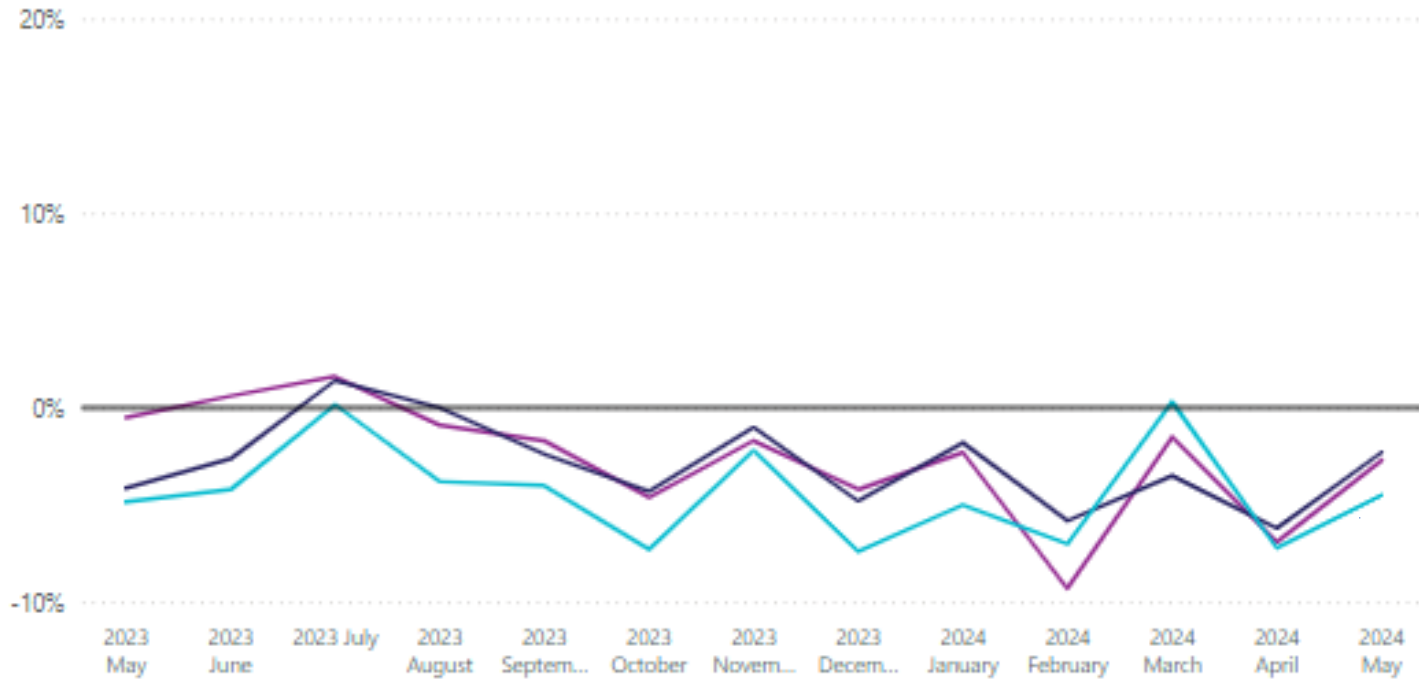
Up **0.1%**

Year-on-Year

WORST PERFORMING WEEK

Week One

Down **7.3%**

Year-on-Year

FOOTFALL BY RETAIL LOCATION
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Footfall By Location (% Change Year-on-Year)

● High Street ● Retail Parks ● Shopping Centres

Retail Parks saw the smallest YoY drop

- **Shopping Centre:**
  - **Footfall fell ↓4.5% YoY**
  - Compared to prior month: footfall rose ↑2.7% points

- **High Street:**
  - **Footfall fell ↓2.7% YoY**
  - Compared to prior month: footfall rose ↑ 4.2% points

- **Retail Park:**
  - **Footfall fell ↓2.3% YoY**
  - Compared to prior month: footfall rose ↑ 3.9% points

Footfall over the last 12 months:

- Once again, Shopping Centres witnessed a significant YoY fall in footfall, becoming the location with the lowest footfall for the second consecutive month.

- High Street retailers also saw a YoY decline in footfall again this month, however, with a clear improvement from last month. This continues a trend of negative footfall YoY since April 2023.

- Retail Parks have followed a similar pattern to High Streets, a decline, with improvement compared to the prior 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 4.5%

Year-on-Year
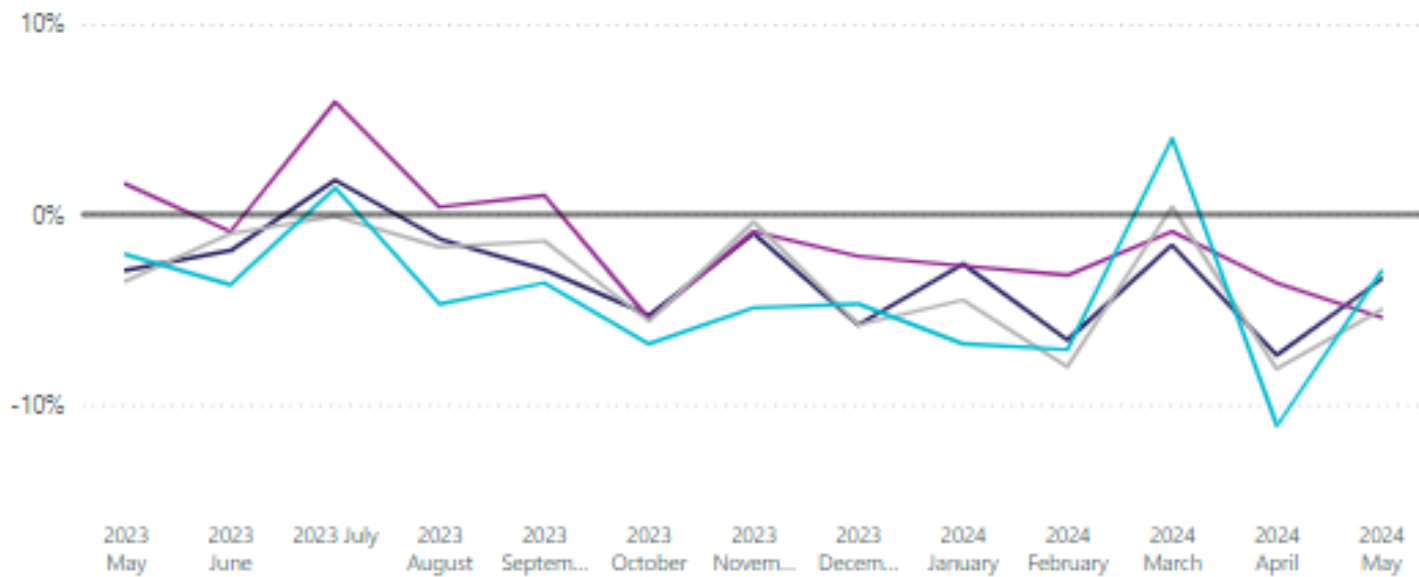
High Street

Down 2.7%

Year-on-Year

Retail Park

Down 2.3%

Year-on-Year

National Footfall (% Change Year-on-Year)

● England ● Scotland ● Wales ● Northern Ireland

| | 2023 May | 2023 June | 2023 July | 2023 August | 2023 Septem... | 2023 October | 2023 Novem... | 2023 Decem... | 2024 January | 2024 February | 2024 March | 2024 April | 2024 May |

UK NATIONS

Footfall Country Rank (YoY)

Northern Ireland:
- **May-24: footfall fell ↓3.0% YoY**
- Compared to prior month: footfall rose ↑8.1% points.
- Risen to first place after being bottom for the seventh time in twelve months

Down **3.0%**

England:
- **May-24: footfall fell ↓3.4% YoY**
- Compared to prior month: footfall rose ↑4.0% points.
- Second on the table for the second consecutive month

Down **3.4%**

Wales:
- **May-24: footfall fell ↓5.0% YoY**
- Compared to prior month: footfall rose ↑3.1% points
- Third on the table for the second consecutive month

Down **5.0%**

Scotland:
- **May-24: footfall fell ↓5.4% YoY**
- Compared to prior month: footfall fell ↓1.8% points.
- Scotland has fallen to last place spending eight of the last twelve months in first place.

Down **5.4%**

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

English Region	May-24	May-24 Rank	Apr-24 Rank	Change in Rank
North East England	-0.2%	1	2	1
London	-2.2%	2	5	3
North West England	-2.3%	3	4	1
West Midlands	-2.9%	4	9	5
East of England	-3.0%	5	1	-4
South West England	-4.0%	6	3	-3
Yorkshire and the Humber	-4.6%	7	6	-1
South East England	-5.0%	8	8	0
East Midlands	-5.5%	9	7	-2

ENGLISH REGIONAL RANKINGS

Highest YoY

- **North East England: footfall fell ↓0.2% YoY, rising 1 place to rank first.**
- Compared to prior month: footfall rose ↑5.5% points
- First time at the top of the table since Jul-23

**Highest YoY
North East England**

Down **0.2%**

Lowest YoY

- **East Midlands: footfall fell ↓5.5% YoY, falling 2 places to the lowest rank.**
- Compared to prior month: footfall rose ↑3.2% points
- First time at the bottom of the table since Mar-23

**Lowest YoY
East Midlands**

Down **5.5%**

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

Cities	May-24	May-24 Rank	Apr-24 Rank	Change in Rank
Birmingham	1.6%	1	8	7
Belfast	0.7%	2	9	7
Liverpool	-1.8%	3	4	1
Manchester	-1.8%	3	6	3
London	-2.2%	5	7	2
Leeds	-3.0%	6	5	-1
Edinburgh	-4.6%	7	1	-6
Glasgow	-4.8%	8	3	-5
Bristol	-5.4%	9	2	-7
Nottingham	-6.7%	10	10	0
Cardiff	-9.1%	11	11	0

UK CITIES RANKINGS

Major Cities:
- **Major City Average: ↓3.3% YoY**
- Compared to prior month: average rose ↑4.0% points.
- City average once again in negative YoY territory for ninth time in eleven months (since Jul-23).

City: Best YoY change
- **Birmingham - improved ↑1.6% YoY**
- Compared to prior month: footfall rose ↑11.6% points
- Strongest monthly performance for the first time since Aug-22

City: Worst YoY change
- **Cardiff - fell ↓9.1% YoY**
- Compared to prior month: footfall fell ↓13.5% points
- Second consecutive month of weakest YoY monthly performance (only second since Oct-22)

Best YoY Improvement
Edinburgh

Up **1.6%**

Worst YoY Fall
Cardiff

Down **9.1%**

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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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