



**Sensormatic
Solutions**

Comprehensive measure of
store customer traffic

Benchmark by UK nations,
location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

July 2024

Period covered:
30 June 2024 – 27 July 2024

Headline commentary



Helen Dickinson OBE | Chief Executive | British Retail Consortium

“Footfall declined for the twelfth consecutive month, failing to maintain the buoyancy seen in 2022/23. As summer got into full swing, many people have chosen to increase their spending on holidays and leisure activities rather than shopping. Election week also saw particularly weak footfall, as political electioneering peaked, creating uncertainty for many consumers.

“With the election now over, many retailers will be making decisions about how and where to invest in the coming years. Retailers welcomed Labour’s promises to reform both business rates and planning laws – two major factors that often hold back much needed local investment. If Labour can address these effectively, they could help breathe new life into retail destinations.”



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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

“Despite a warmer and drier month compared to the wash-out that was June, July’s footfall faltered with shopper traffic falling back to the same levels we saw in May. As we approach a full year of seeing footfall yo-yo in its ongoing recovery, it’s clear the longtail of the cost-of-living crisis is continuing to rattle consumer confidence and is likely to prompt spending caution for some time to come, making each in-store conversion all the harder won. With election fever now over and the school holidays now in full swing, retailers will be hoping that spells a positive outlook for store performance in the months to come.”

Executive Summary

Following a slight improvement in June, footfall traffic decelerated to -3.3% year-on-year (YoY) in July, marking a 1.0 percentage point decline from the previous month. Despite better weather in July, following an unseasonably cool and wet June, the negative trend persisted, leading to the twelfth consecutive month of YoY decline in footfall traffic. It seems that many consumers are opting to allocate more of their spending on days out, dining, and other leisure experiences, as reflected in our latest [Consumer Sentiment Monitor](#).

Retail Footfall Index – July 2024

- Footfall fell **3.3%** YoY
- Compared to June, footfall down by **1.0%** points
- Rolling 3-mth average: fell **3.1%** YoY
- Compared to previous 3-mth average: rose **1.1%** points

Down 3.3%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- Jul-24: footfall fell **2.7%** YoY
- Compared to June: footfall up by **0.4%** points

Down 2.7%
% change YoY

Retail Parks

- Jul-24: footfall fell **0.8%** YoY
- Compared to prior month: footfall fell by **0.4%** points

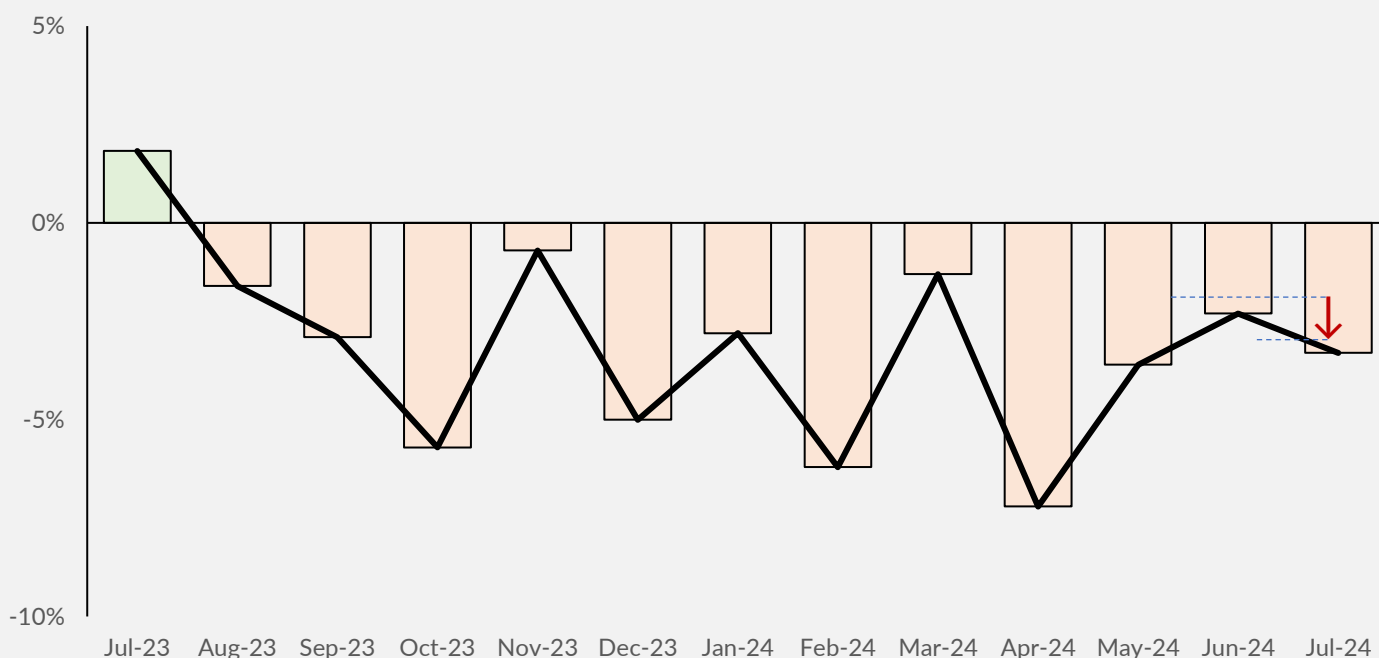
Down 0.8%
% change YoY

Shopping Centres

- Jul-24: footfall fell **3.9%** YoY
- Compared to prior month: footfall fell by **0.7%** points

Down 3.9%
% change YoY

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



Consumers prioritised leisure spending over retail

- **UK total retail footfall fell by 3.3% year-on-year** in July 2024.
- This was worse compared with the previous month – down by **1.0 percentage points** compared to **June 2024**.
- The key factors that have contributed to footfall performance are:
 - **Consumer behaviour:** Despite the warmer weather in July, many consumers chose to spend on leisure activities and experiences rather than retail shopping.
 - **Political Factors:** With the election now over and the stability of a new government, retailers welcomed Labour's promises to reform both business rates and planning laws. If Labour can address these effectively they could help breathe new life into retail destinations.

UK Total Retail

Jul-24

Down 3.3%

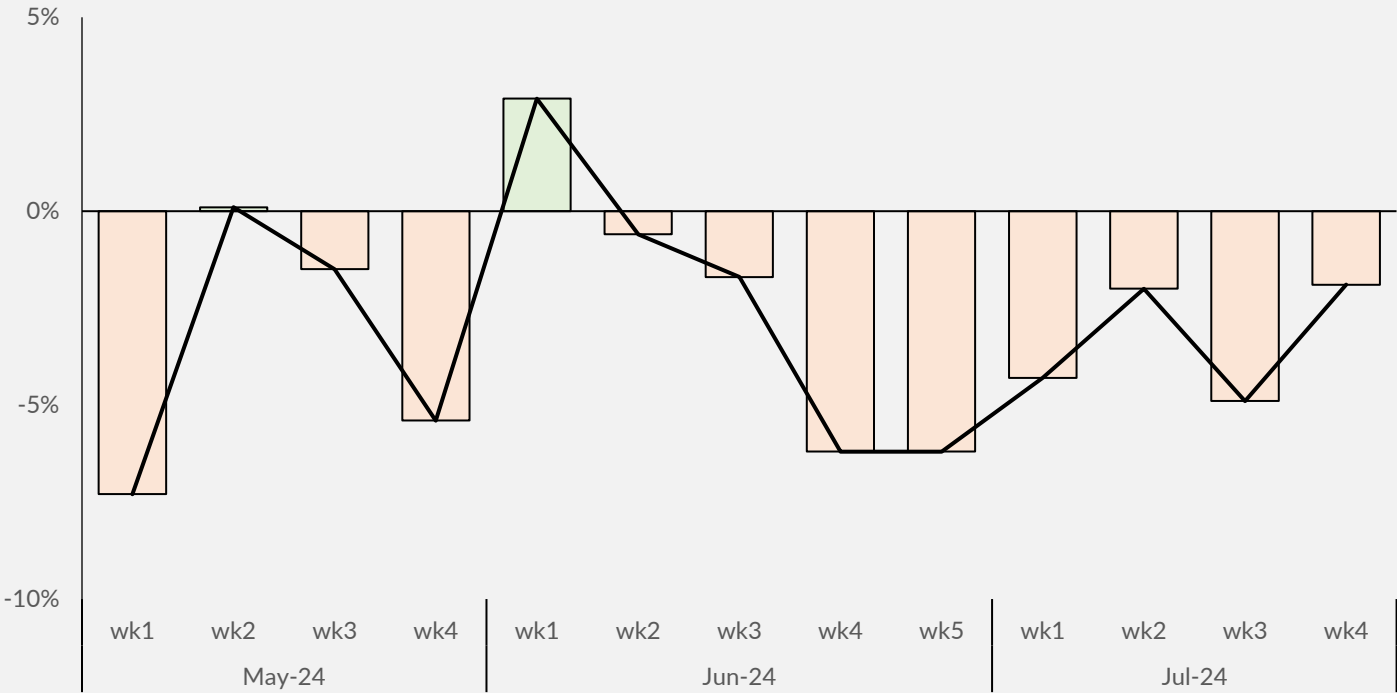
Year-on-Year

3-month rolling average

Down 3.1%

Year-on-Year

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



UK WEEKLY FOOTFALL

- July consists of 4 calendar weeks.
- Footfall is lower for four of the four weeks year-on-year compared to last year.
- Overall, July showed a consistent downward trend throughout the month
- Week 1 continued a trend of negative footfall into the following weeks.
- Week 3 showed the most significant decline for July.

BEST PERFORMING WEEK

Week Four

Down 1.9%

Year-on-Year

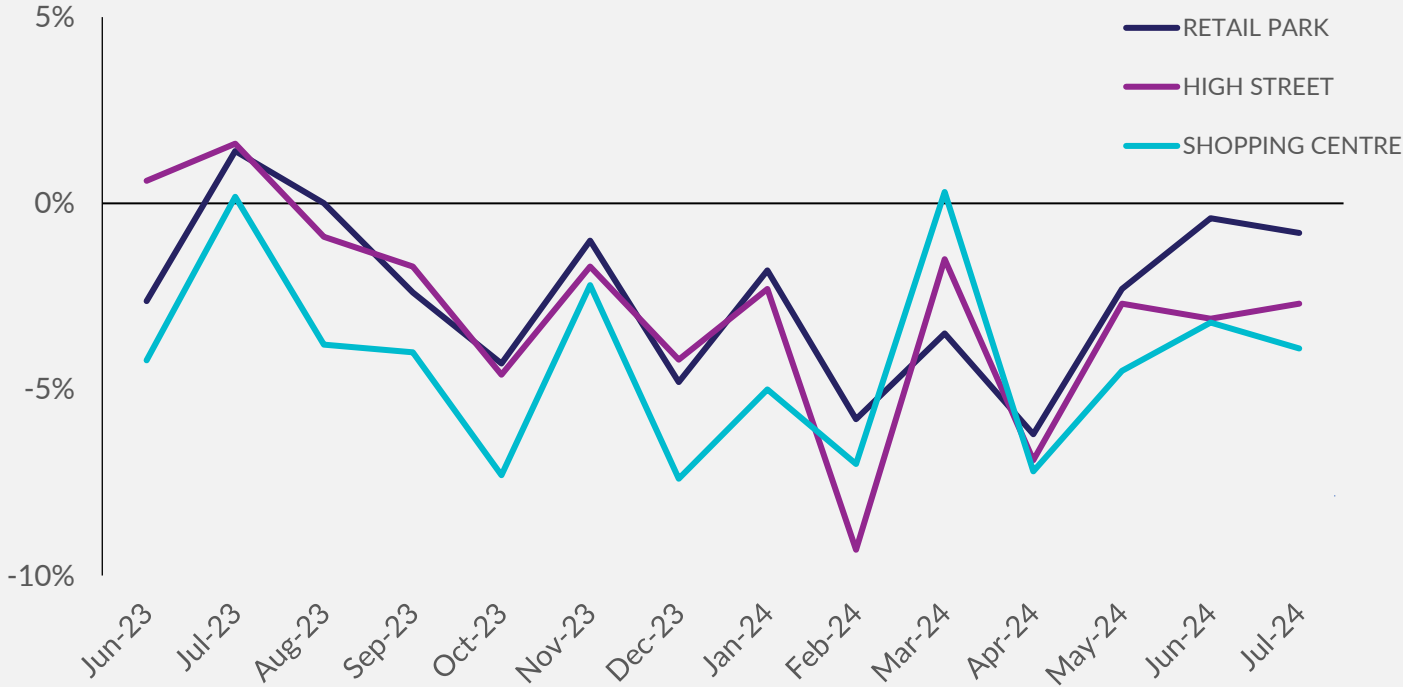
WORST PERFORMING WEEK

Weeks Three

Down 4.9%

Year-on-Year

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



Retail Parks saw the smallest YoY drop

- **Shopping Centre:**
 - Footfall fell ↓3.9% YoY
 - Compared to prior month: footfall fell ↓ 0.7% points
- **High Street:**
 - Footfall fell ↓2.7% YoY
 - Compared to prior month: footfall rose ↑ 0.4% points
- **Retail Park:**
 - Footfall fell ↓0.8% YoY
 - Compared to prior month: footfall rose ↓ 0.4% points

Footfall over the last 12 months:

- For the fourth consecutive month, Shopping Centres recorded the lowest footfall of all retail destinations, with the YoY decline in July accelerating from the previous month.
- While High Street retailers saw a slight improvement in YoY performance during July, footfall remained in decline for the twelfth consecutive month.
- Retail Parks continue to follow a similar pattern to Shopping Centres, with an acceleration in the YoY decline in July, albeit a marginal increase.

Shopping Centre

Down 3.9%

Year-on-Year

High Street

Down 2.7%

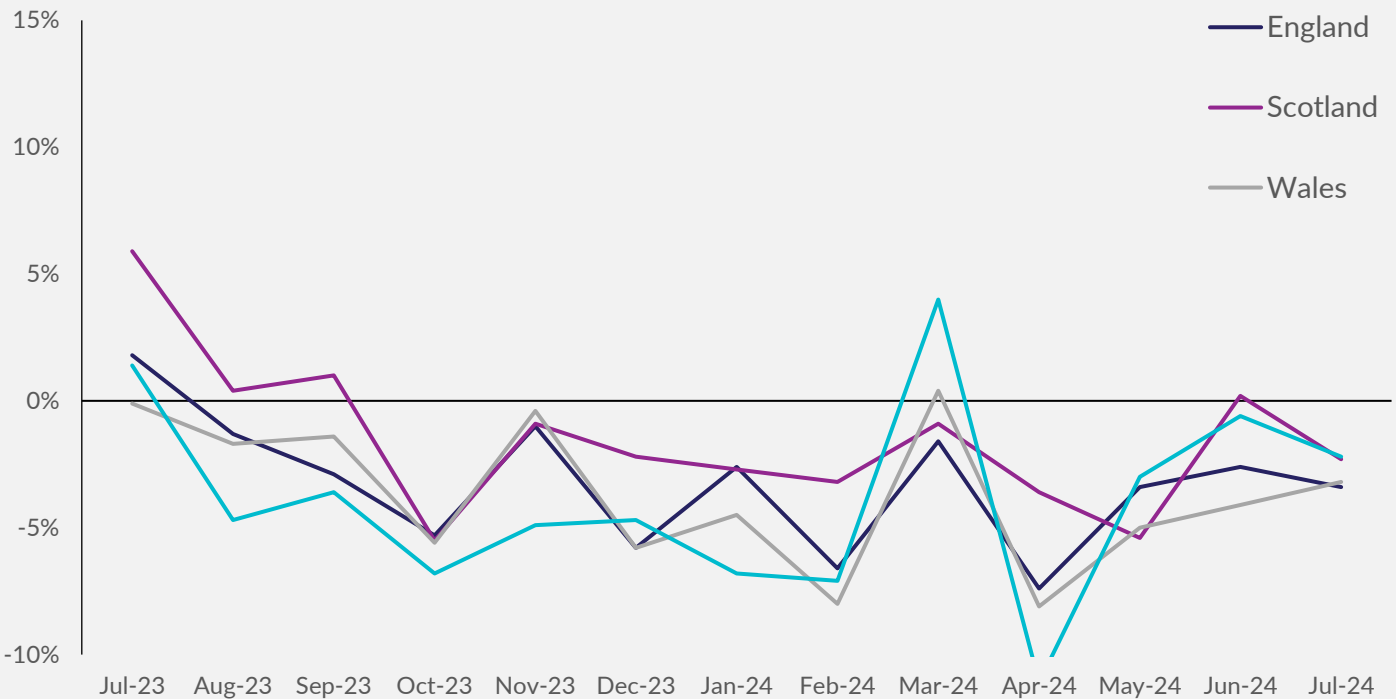
Year-on-Year

Retail Park

Down 0.8%

Year-on-Year

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



UK NATIONS

Footfall Country
Rank (YoY)

Northern Ireland:

- Jul-24 : footfall fell ↓2.2% YoY
- Compared to prior month: footfall fell ↓ 1.6% points.
- First on the table after being Second last month.

Down 2.2%



Scotland:

- Jul-24: footfall fell ↓2.3% YoY
- Compared to prior month: footfall fell ↓2.5 % points.
- Scotland has fallen to Second place spending five of the last twelve months in first place.

Down 2.3%



Wales:

- Jul-24 : footfall fell ↓3.2% YoY
- Compared to prior month: footfall rose ↑0.9% points
- Wales has risen to third place after being fourth last month.

Down 3.2%



England:

- Jul-24 : footfall fell ↓3.4% YoY
- Compared to prior month: footfall fell ↓ 0.8% points.
- Last on the table, fallen from third last month.

Down 3.4%



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

| Nation/Region | Jul-24 | Jul-24 rank | Jun-24 rank | Rank Change |
|--------------------------|--------|-------------|-------------|-------------|
| London | -1.4% | 1 | 8 | ↑7 |
| North West England | -1.8% | 2 | 4 | ↑2 |
| Northern Ireland | -2.2% | 3 | 3 | →0 |
| Scotland | -2.3% | 4 | 1 | ↓-3 |
| North East England | -2.7% | 5 | 1 | ↓-4 |
| Wales | -3.2% | 6 | 12 | ↑6 |
| East of England | -3.4% | 7 | 5 | ↓-2 |
| England | -3.4% | 7 | 9 | ↑2 |
| West Midlands | -3.6% | 9 | 11 | ↑2 |
| East Midlands | -4.1% | 10 | 10 | →0 |
| South East England | -5.0% | 11 | 13 | ↑2 |
| Yorkshire and the Humber | -5.4% | 12 | 6 | ↓-6 |
| South West England | -6.0% | 13 | 7 | ↓-6 |

ENGLISH REGIONAL RANKINGS

Highest YoY

- London: footfall fell ↓1.4% YoY, staying in first place.
- Compared to prior month: footfall rose ↑1.1% points.
- Fourth time at the top of the table since Aug-23.

Highest YoY
London

Down 1.4%

Lowest YoY

- South West England: footfall fell ↓6.0% YoY, falling 1 place to the lowest rank.
- Compared to prior month: footfall fell ↓3.8% points.
- First time at the bottom of the table since Aug-23.

Lowest YoY
South West England

Down 6.0%

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

| City | Jul-24 | Jul-24 rank | Jun-24 rank | Rank Change |
|------------|--------|-------------|-------------|-------------|
| Edinburgh | +1.4% | 1 | 2 | ↑1 |
| Liverpool | +0.9% | 2 | 4 | ↑2 |
| Belfast | +0.3% | 3 | 1 | ↓-2 |
| London | -1.4% | 4 | 7 | ↑3 |
| Manchester | -2.7% | 5 | 5 | →0 |
| Leeds | -2.8% | 6 | 6 | →0 |
| Cardiff | -3.9% | 7 | 11 | ↑4 |
| Nottingham | -4.6% | 8 | 8 | →0 |
| Glasgow | -4.8% | 9 | 3 | ↓-6 |
| Birmingham | -5.9% | 10 | 10 | →0 |
| Bristol | -7.1% | 11 | 9 | ↓-2 |

UK CITIES RANKINGS

Major Cities:

- Major City Average: ↓2.8% YoY
- Compared to prior month: average fell ↓ 1.7% points.
- City average once again in negative YoY territory for eleventh time in twelve months (since Aug-23).

City: Best YoY change

- Edinburgh - rose ↑1.4% YoY
- Compared to prior month: footfall fell ↓ 1.0% points.
- Once again strongest YoY monthly performance after Mar-24.

City: Worst YoY change

- Bristol - fell ↓7.1% YoY
- Compared to prior month: footfall fell ↓3.6% points.
- Consecutively down YoY monthly performance (since Aug-23).

Best YoY Improvement

Edinburgh

Up 1.4%

Worst YoY Fall

Bristol

Down 7.1%

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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