



**Sensormatic
Solutions**

Comprehensive measure of
store customer traffic

Benchmark by UK nations,
location type and major cities

BRC-SENSORMATIC IQ FOOTFALL MONITOR

June 2024

Period covered:
26 May 2024 – 29 June 2024

Headline commentary



Helen Dickinson OBE | Chief Executive | British Retail Consortium

“With June failing to live up to last year’s heatwave, overall footfall declined last month compared to the previous year. However retail parks and shopping centres did see an uptick compared to the previous month’s washout, and footfall levels in Edinburgh and Liverpool were boosted as Taylor Swift enchanted crowds of fans. Retailers are hoping that warmer weather and maybe, just maybe, a successful European Championships for England could bring footfall home this July.

“As the new government forms today, it is vital that the problems facing local communities are addressed in its first hundred days. Planning reform must be a priority - a fast-track planning system, which includes automatic approval in certain cases will give retailers tools to invest up and down the country. Speeding up these processes, alongside reform of business rates, will help town and city centres to thrive. With our high streets undergoing transformation, as properties are used more often for wider purposes beyond retail, these reforms are essential for successful regeneration of local areas across the UK and ensuring footfall recovers in the medium and longer term.”



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Andy Sumpter | Retail Consultant – EMEA | Sensormatic Solutions

“June’s footfall saw an improvement in performance compared to last month. With the rain finally giving way to drier and sunnier weather, this along with events including the start of the 2024 Euros and Taylor Swift’s Eras tour helped to deliver an ambient boost to shopper traffic. However, while edging up compared to May, store visits remain marginally down compared to 2023, suggesting recovery in shopper traffic has yet fully to turn a corner. With home-nation hope still alive in the Euros, retailers will be hoping football – and footfall – will be coming home in July, as other major sporting events, including Wimbledon and the Paris Olympics, also provide positive opportunities to entice shoppers into store.”

Executive Summary

In June, footfall traffic declined by 2.3% year-on-year (YoY) which again showed a clear improvement from May, albeit a continuation of the downward trend which started in March 2023. Due to a slow start to the summer weather, a late heatwave was not enough to offset the decline of footfall in June, emphasising the challenges that retail footfall is currently facing. As warm weather approaches, a summer filled with events such as the Euros and the Olympics, along with the General Election providing change, means retailers are hopeful for positive footfall into the summer months.

Retail Footfall Index – June 2024

- Footfall fell **2.3%** YoY
- Compared to May, footfall rose by **1.3%** points
- Rolling 3-mth average: fell **4.2%** YoY
- Compared to previous 3-mth average: fell **0.2%** points

Down 2.3%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- Jun-24: footfall fell **3.1%** YoY
- Compared to May: footfall fell by **0.4%** points

Down 3.1%
% change YoY

Retail Parks

- Jun-24: footfall fell **0.4%** YoY
- Compared to prior month: footfall rose by **1.9%** points

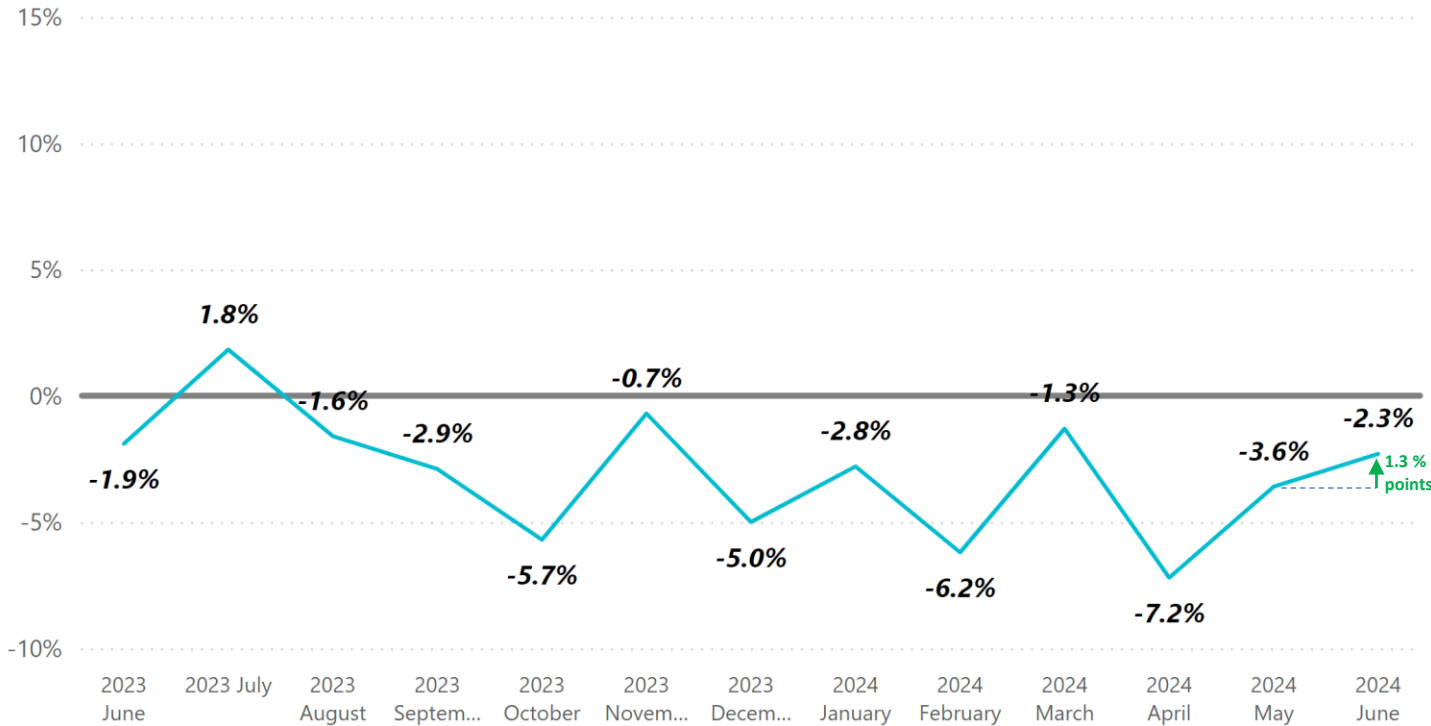
Down 0.4%
% change YoY

Shopping Centres

- Jun-24: footfall fell **3.2%** YoY
- Compared to prior month: footfall rose by **1.3%** points

Down 3.2%
% change YoY

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



Opportunity for new government to bring footfall home this summer

- **UK total retail footfall fell by 2.3% year-on-year** in June 2024.
- This was an improvement month-on-month – up by **1.3 percentage points** compared to **May 2024**.
- The key factors that have contributed to footfall performance are:
 - **Weather Conditions:** Poor weather in the early weeks of June resulted in shoppers visiting fewer stores. A heatwave in the final week wasn't enough to impact overall footfall.
 - **Economic Factors:** The upcoming General Election and the current state of the economy has caused uncertainty and reduced the level of optimism in the UK economy, with 1 in 5 consumers reporting that they are struggling to cope financially.¹

UK Total Retail

Jun-24

Down 2.3%

Year-on-Year

3-month rolling average

Down 4.2%

Year-on-Year

¹[BRC Consumer Sentiment Monitor – June 2024](#)

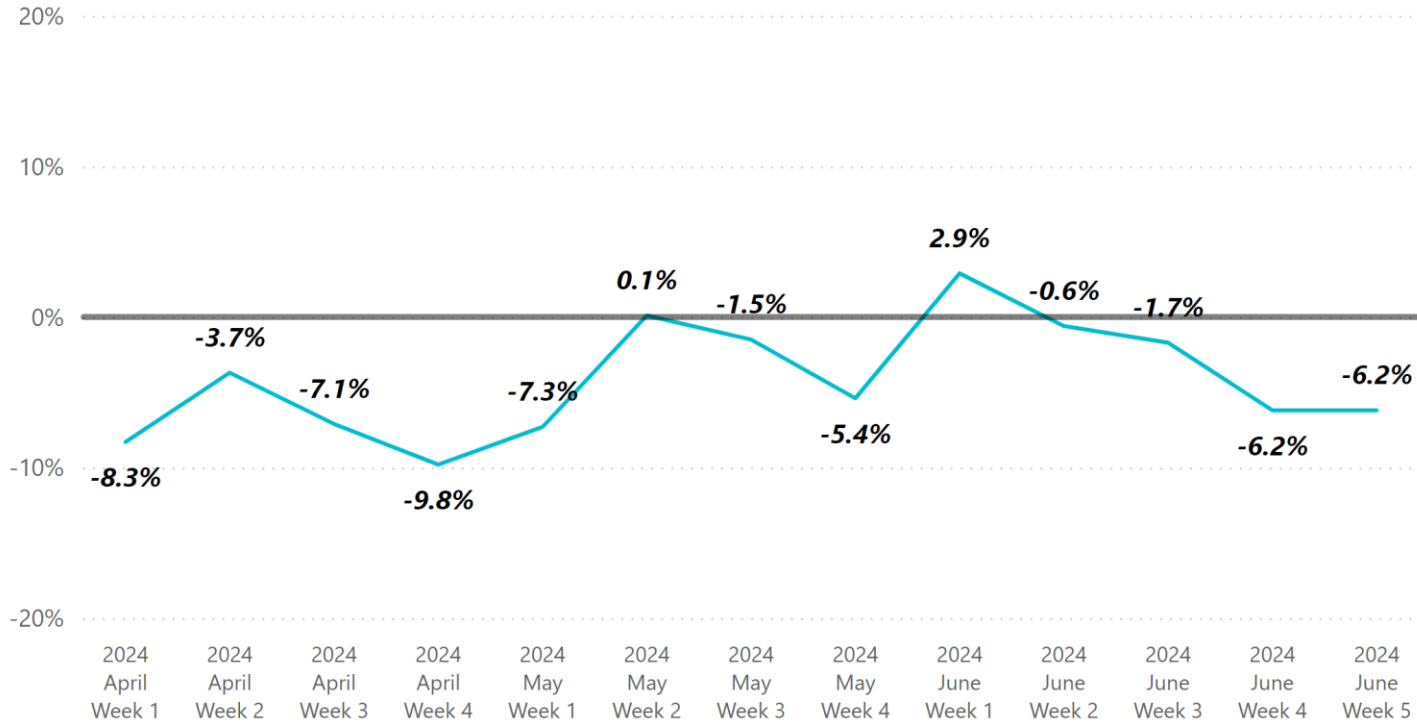
TOTAL FOOTFALL – BY WEEK

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



UK WEEKLY FOOTFALL

- June consists of 5 calendar weeks.
- Footfall is lower for four of the five weeks year-on-year compared to last year.
- Overall, June showed a consistent downward trend throughout the month, starting after Week 1 which showed the only YOY increase.
- After a positive Week 1, Week 2 exhibited a slight decrease which continued a trend of negative footfall into the following weeks.
- Both Weeks 4 and 5 showed the most significant decline for June.

BEST PERFORMING WEEK

Week One

Up 2.9%

Year-on-Year

WORST PERFORMING WEEK

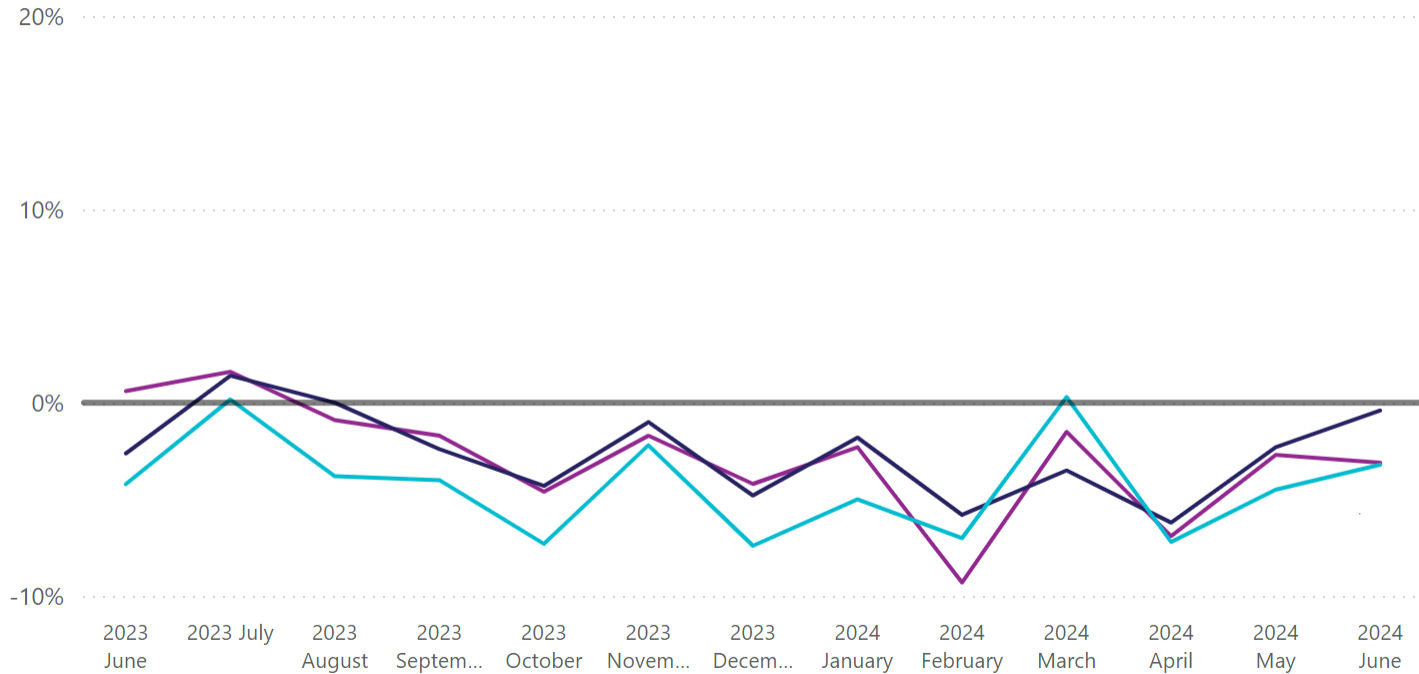
Weeks Four & Five

Down 6.2%

Year-on-Year

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

● High Street ● Retail Parks ● Shopping Centres



Retail Parks saw the smallest YoY drop

- **Shopping Centre:**
 - Footfall fell ↓3.2% YoY
 - Compared to prior month: footfall rose ↑ 1.3% points
- **High Street:**
 - Footfall fell ↓3.1% YoY
 - Compared to prior month: footfall fell ↓ 0.4% points
- **Retail Park:**
 - Footfall fell ↓0.4% YoY
 - Compared to prior month: footfall rose ↑ 1.9% 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 third consecutive month.
- High Street retailers also saw a YoY decline in footfall again this month, even performing slightly worse compared to the prior month of May. This continues a trend of negative footfall YoY beginning after July 2023.
- Retail Parks have followed a similar pattern to Shopping Centres, a YoY decline, with improvement compared to the prior month. This location have entered negative territory at least since June 2023 through to this month, with footfall stabilising in July, before resuming a decline into August with occasional month-on-month improvements.

Shopping Centre

Down 3.2%

Year-on-Year

High Street

Down 3.1%

Year-on-Year

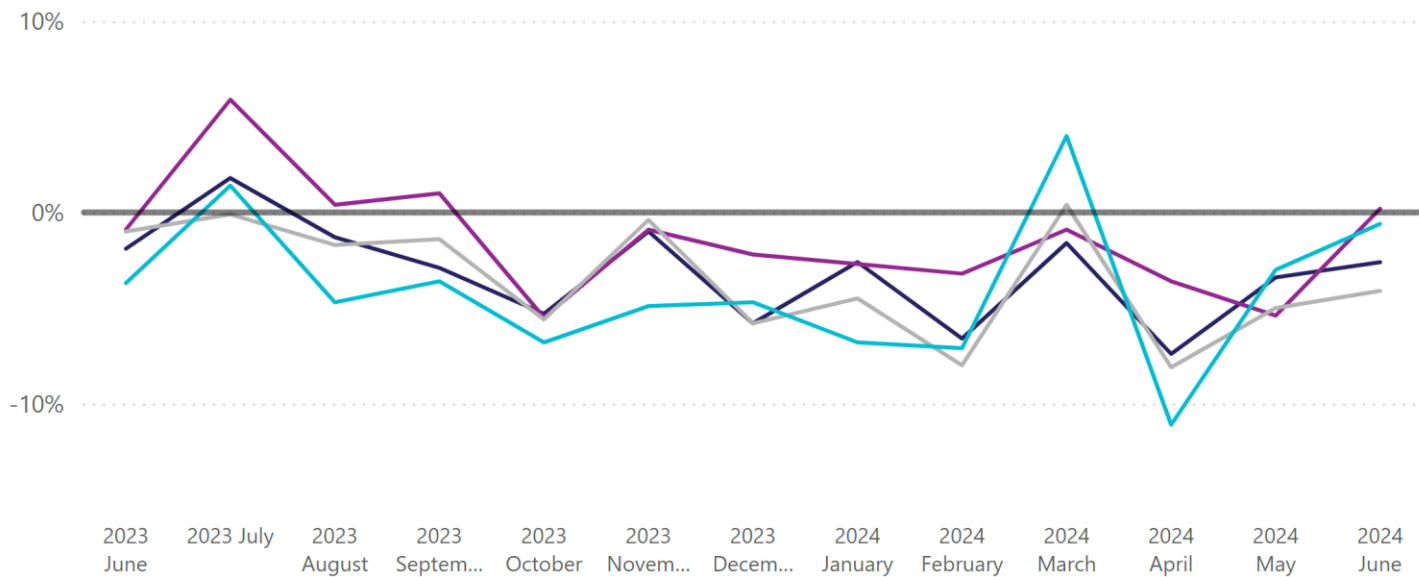
Retail Park

Down 0.4%

Year-on-Year

National Footfall (% Change Year-on-Year)

● England ● Scotland ● Wales ● Northern Ireland



UK NATIONS

Footfall Country
Rank (YoY)

Scotland:

- Jun-24: footfall rose $\uparrow 0.2\%$ YoY
- Compared to prior month: footfall rose $\uparrow 5.6\%$ points.
- Scotland has risen back to first place spending seven of the last twelve months in first place.

Up **0.2%**

Northern Ireland:

- Jun-24: footfall fell $\downarrow 0.6\%$ YoY
- Compared to prior month: footfall rose $\uparrow 2.4\%$ points.
- Second on the table after being first last month.

Down **0.6%**

England:

- Jun-24: footfall fell $\downarrow 2.6\%$ YoY
- Compared to prior month: footfall rose $\uparrow 0.8\%$ points.
- Third on the table, falling from second last month.

Down **2.6%**

Wales:

- Jun-24: footfall fell $\downarrow 4.1\%$ YoY
- Compared to prior month: footfall rose $\uparrow 0.9\%$ points
- Fallen to last place after being third last month.

Down **4.1%**

UK FOOTFALL BY ENGLISH REGION

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

English Region	Jun-24	Jun-24 Rank	May-24 Rank	Change in Rank
North East England	0.2%	1	1	→ 0
North West England	-0.8%	2	3	↑ 1
East of England	-1.4%	3	5	↑ 2
Yorkshire and the Humber	-2.1%	4	7	↑ 3
South West England	-2.2%	5	6	↑ 1
London	-2.5%	6	2	↓ -4
East Midlands	-3.5%	7	9	↑ 2
West Midlands	-4.0%	8	4	↓ -4
South East England	-5.0%	9	8	↓ -1

ENGLISH REGIONAL RANKINGS

Highest YoY

- North East England: footfall rose ↑0.2% YoY, staying in first place.
- Compared to prior month: footfall rose ↑0.4% points.
- Second time at the top of the table since Jul-23.

Highest YoY
North East England

Up **0.2%**

Lowest YoY

- South East England: footfall fell ↓5.0% YoY, falling 1 place to the lowest rank.
- Compared to prior month: footfall unchanged.
- First time at the bottom of the table.

Lowest YoY
South East England

Down **5.0%**

UK FOOTFALL BY CITY

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

Cities	Jun-24	Jun-24 Rank	May-24 Rank	Change in Rank
Belfast	3.7%	1	2	↑ 1
Edinburgh	2.4%	2	7	↑ 5
Glasgow	2.2%	3	8	↑ 5
Liverpool	1.1%	4	3	↓ -1
Manchester	-0.9%	5	4	↓ -1
Leeds	-2.1%	6	6	→ 0
London	-2.5%	7	5	↓ -2
Nottingham	-3.1%	8	10	↑ 2
Bristol	-3.5%	9	9	→ 0
Birmingham	-4.0%	10	1	↓ -9
Cardiff	-5.1%	11	11	→ 0

UK CITIES RANKINGS

Major Cities:

- Major City Average: ↓1.1% YoY
- Compared to prior month: average rose ↑2.3% points.
- City average once again in negative YoY territory for tenth time in twelve months (since Jul-23).

City: Best YoY change

- Belfast - rose ↑3.7% YoY
- Compared to prior month: footfall rose ↑3.0% points.
- Once again strongest YoY monthly performance after Mar-24.

City: Worst YoY change

- Cardiff - fell ↓5.1% YoY
- Compared to prior month: footfall rose ↑4.0% points.
- Third consecutive month of weakest YoY monthly performance (only third time since Oct-22).

Best YoY Improvement

Belfast

Up **3.7%**

Worst YoY Fall

Cardiff

Down **5.1%**

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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