BRC

Sensormatic
by Johnson Controls

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC FOOTFALL MONITOR

August 2024

Period covered:
28 July 2024 – 24 August 2024

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"As violent disorder erupted across the country earlier in the month, footfall was severely impacted as many people stayed away from shopping destinations. Retail parks saw footfall levels rise in the week following the riots as some continued to avoid high streets and shopping centres. Footfall recovered across all destinations towards the end of the month when warmer weather and summer sales prompted shoppers to browse their favourite stores."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic

"Despite the unrest at the beginning of the month, a strong footfall performance in the second half of August, helped by an easing of price inflation, fair weather and a boost from school and bank holiday trade, saw year-on-year shopper traffic rise to its highest level since July 2023. With all destination types improving on July's visitor numbers, retail parks, which potentially picked up shopper traffic from town centres during riot disruption, had a standout month. Retailers will be hoping that the resilience seen in August, with footfall tantalisingly close to returning a positive year-on-year performance, will lead to longer-term growth for store traffic."

Executive Summary

A strong final week of August leading up to the bank holiday weekend helped deliver the best year-on-year results for footfall in the last 12 months, despite unrest from riots in city centres across England, Northern Ireland and Wales affecting traffic earlier in the month. Retail Parks were up YOY for the first time since July 2023, and every single region performed better YOY than last month.

Retail Footfall Index – July 2024

- Footfall fell **0.4**% YoY
- Compared to July, footfall up by **2.9**% points
- Rolling 3-mth average: down **2.0**% YoY
- Compared to previous 3-mth average: rose 1.1% points

Down **0.4%**
% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- Aug-24: footfall down **0.3**% YoY
- Compared to prior month: Change in YOY footfall up by 2.4% points

Down **0.3%**
% change YoY

Retail Parks

- Aug-24: footfall up 2.6% YoY
- Compared to prior month: Change in YOY footfall up by 3.4% points
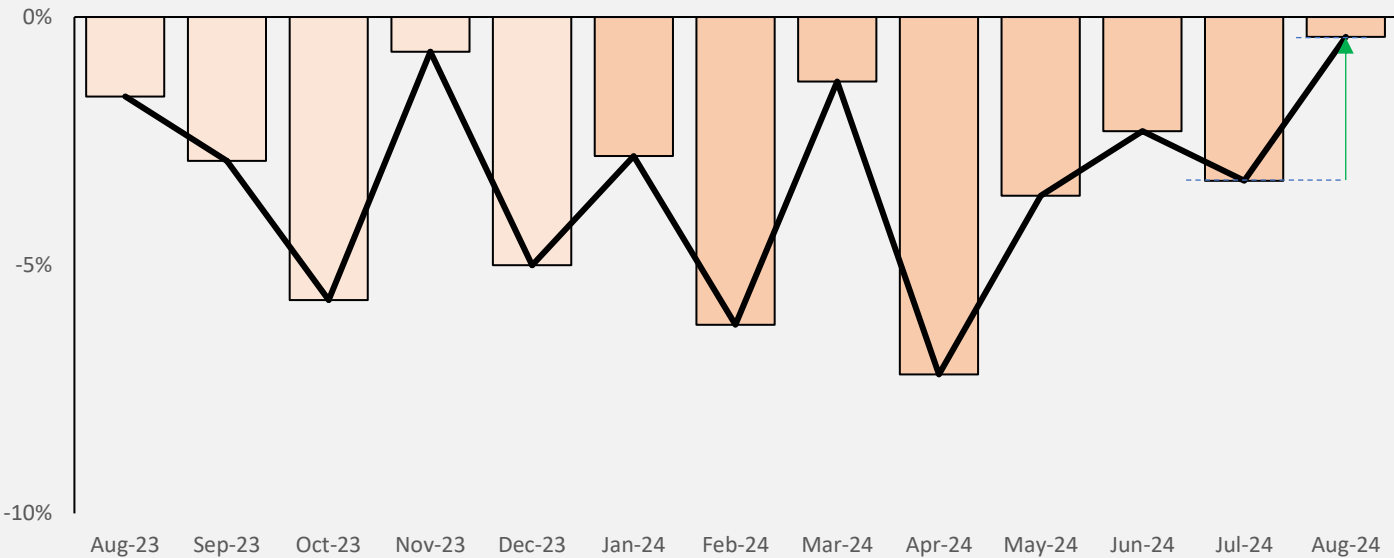
UP **2.6%**
% change YoY

Shopping Centres

- Aug-24: footfall down 1.8% YoY
- Compared to prior month: Change in YOY footfall up by 2.1% points

Down **1.8%**
% change YoY

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

Monthly UK Total Retail Footfall: 2024

A strong week leading up to the bank holiday helped deliver the best year-on-year results in the 12 months

- **UK total retail footfall fell by 0.4% year-on-year** in August 2024.

- This was up by **2.9 percentage points** compared to **July 2024**.

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

  - **Bank Holiday Weekend:** With good weather and a bank holiday weekend coming up, people were enjoying the sun and shopping to prepare for the weekend in the final week of the month

  - **Riots:** Despite a very warm first week of August, riots across many of the cities contributed to footfall dropping 5.6% below the equivalent week last year

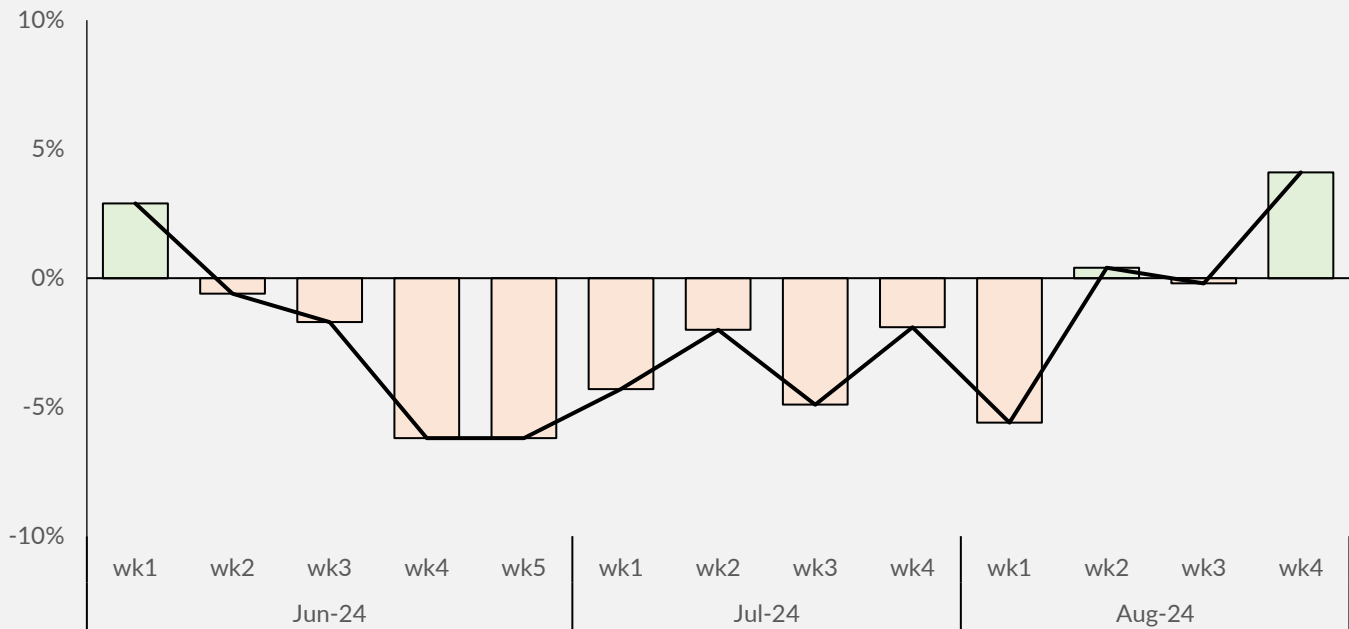### UK Total Retail

Jul-24
Down 0.4%
Year-on-Year

3-month rolling average
Down 2.0%
Year-on-Year

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

UK WEEKLY FOOTFALL

- July consists of 4 calendar weeks.

- Footfall year-on-year is higher in multiple weeks for the first time since March.

- Overall, a weak start to the month was offset by a strong finish

- Week 1 saw YOY declines in every major city in the UK

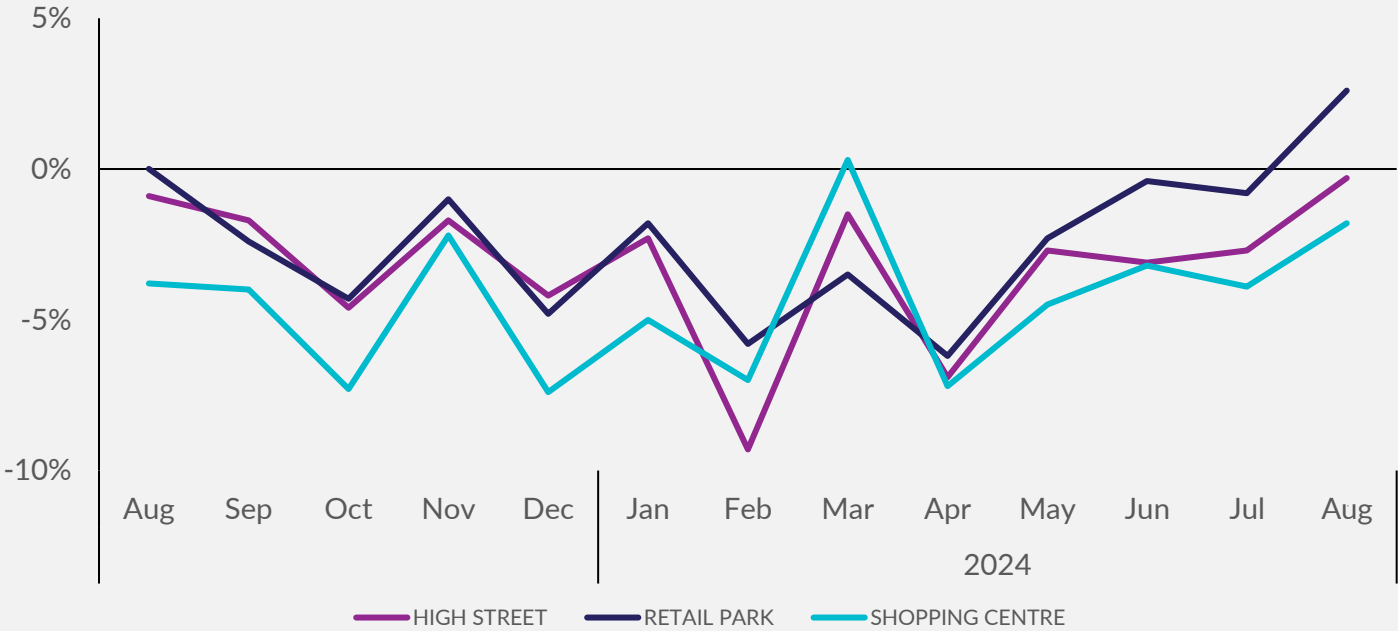- Week 4 was the 3rd best performing week of 2024, YOY.

BEST PERFORMING WEEK

Week Four

Up 4.1%

Year-on-Year

WORST PERFORMING WEEK

Week One

Down -5.6%

Year-on-Year

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

Legend: ━━ HIGH STREET ━━ RETAIL PARK ━━ SHOPPING CENTRE

Retail Parks saw the smallest YoY drop

- **Shopping Centre:**
  - **Footfall down ↓1.8% YoY**
  - Compared to prior month: Change in YOY footfall ↑2.1% points
- **High Street:**
  - **Footfall down ↓0.3% YoY**
  - Compared to prior month: Change in YOY footfall ↑2.4% points

- **Retail Park:**
  - **Footfall up ↑2.6% YoY**
  - Compared to prior month: Change in YOY footfall ↑3.4% points

Footfall over the last 12 months:

- For the fifth consecutive month, Shopping Centres recorded the lowest footfall of all retail destinations, with but the YoY decline was

- While High Street were mostly flat YOY, which is positive considering the riots during the first couple of weeks.

- Retail Parks were up YOY for the first time since July 2023

Shopping Centre
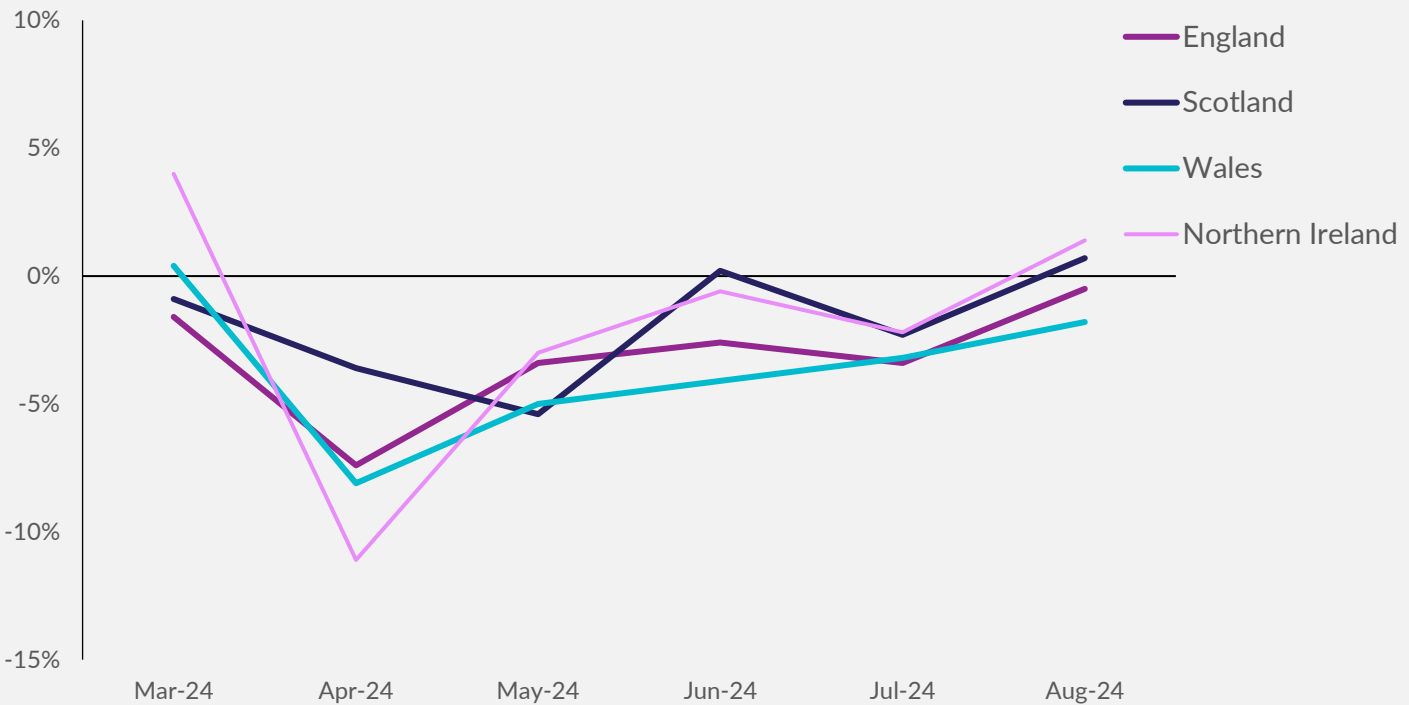
Down 1.8%

Year-on-Year

High Street

Down 0.3%

Year-on-Year

Retail Park

Up 2.6%

Year-on-Year

UK TOTAL FOOTFALL BY REGION
BRC - Sensormatic Footfall Monitor

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by **Johnson Controls**

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)

Legend: England, Scotland, Wales, Northern Ireland

UK NATIONS

Footfall Country Rank (YoY)

Northern Ireland:
- **Aug-24 : footfall up ↑ 1.4% YoY**
- Compared to prior month: Change in YOY footfall ↑3.6% points
- First on the table for the second month in a row

Up 1.4%

Scotland:
- **Aug-24: footfall up ↑ 0.7% YoY**
- Compared to prior month: Change in YOY footfall ↑3.0% points
- Scotland has placed second on the table behind Northern Ireland two months in a row now, but has had positive growth in two of the last three months

Up 0.7%

England:
- **Aug-24 : footfall down ↓0.5% YoY**
- Compared to prior month: Change in YOY footfall ↑2.9% points
- Third place on the table, but a big improvement on last month's 3.4% decline

Down 0.5%

Wales:
- **Aug-24 : footfall fell ↓1.8% YoY**
- Compared to prior month: Change in YOY footfall ↑1.4% points
- Wales has risen to third place after being fourth last month.

Down 1.8%

UK FOOTFALL BY ENGLISH REGION
BRC - Sensormatic Footfall Monitor

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

Nation/Region	Aug-24	Jul-24	Aug-24 rank	Jul-24 rank	Rank Change
Northern Ireland	+1.4%	-2.2%	1	3	⬆2
London	+0.8%	-1.4%	2	1	⬇-1
North West England	+0.7%	-1.8%	3	2	⬇-1
Scotland	+0.7%	-2.3%	4	4	➡0
East of England	–	-3.4%	5	7	⬆2
East Midlands	-0.1%	-4.1%	6	10	⬆4
South East England	-0.4%	-5.0%	7	11	⬆4
North East England	-0.5%	-2.7%	8	5	⬇-3
England	-0.5%	-3.4%	8	7	⬇-1
West Midlands	-0.8%	-3.6%	10	9	⬇-1
South West England	-1.7%	-6.0%	11	13	⬆2
Wales	-1.8%	-3.2%	12	6	⬇-6
Yorkshire and the Humber	-2.2%	-5.4%	13	12	⬇-1

ENGLISH REGIONAL RANKINGS

Highest YoY

- **Northern Ireland: footfall up ↑1.4% YoY, capturing first after being in third last month**
- Compared to prior month: Change in YOY footfall ↑3.6% points
- Fourth time at the top of the table since Aug-23.

Lowest YoY

- **Yorkshire and the Humber: footfall down ↓2.2% YoY, falling one spot to the lowest rank**
- Compared to prior month: Change in YOY footfall ↑3.2% points
- Although at the bottom of the table this month, a 2.2% drop last month would have been tied for 3rd place

Highest YoY
Northen Ireland

Up **1.4%**

Lowest YoY
Yorkshire and the Humber

Down **2.2%**

UK FOOTFALL BY CITY
BRC - Sensormatic Footfall Monitor

City	Aug-24	Jul-24	Aug-24 rank	Jul-24 rank	Rank Change
Edinburgh	+2.6%	+1.4%	1	1	➡ 0
London	+0.8%	-1.4%	2	4	⬆ 2
Belfast	-0.2%	+0.3%	3	3	➡ 0
Glasgow	-0.6%	-4.8%	4	9	⬆ 5
Manchester	-1.4%	-2.7%	5	5	➡ 0
Leeds	-1.5%	-2.8%	6	6	➡ 0
Liverpool	-1.9%	+0.9%	7	2	⬇ -5
Nottingham	-3.6%	-4.6%	8	8	➡ 0
Cardiff	-4.1%	-3.9%	9	7	⬇ -2
Bristol	-4.2%	-7.1%	10	11	⬆ 1
Birmingham	-8.1%	-5.9%	11	10	⬇ -1

UK CITIES RANKINGS

Major Cities:
- **Major City Average: ↓2.0% YoY**
- Compared to prior month: Change in YOY footfall ↑0.8% points
- City average once again in negative YoY territory for 13th straight month (since July-23).

City: Best YoY change
- **Edinburgh - Up ↑2.6% YoY**
- Compared to prior month: Change in YOY footfall ↑1.2% points
- Boosted by the festivals, Edinburgh took the top spot for the second month in a row

City: Worst YoY change
- **Birmingham - down ↓8.1% YoY**
- Compared to prior month: Change in YOY footfall ↓2.2% points
- Birmingham has been down more than 5% in 5 of the last 12 months.

Best YoY Improvement
Edinburgh

Up **2.6%**

Worst YoY Fall
Birmingham

Down **8.1%**

THE BRC & SENSORMATIC

Together with the BRC and its members, Sensormatic 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, 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 brand each year.

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