



Sensormatic
by Johnson Controls



FOOTFALL MONITOR

Comprehensive benchmark of store customer traffic by UK nations, location type, and major cities.

JULY 2026

Covering the five weeks 05 July - 01 August 2026





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Headline Commentary



Helen Dickinson OBE
Chief Executive | British Retail Consortium

“The heatwave continued to bear down on retail footfall in July, with high streets worst affected. London was hit particularly hard as soaring temperatures made tube and train travel less attractive, with some commuters and shoppers opting to stay home. Nonetheless, it was still an improvement on the previous month’s figures, when record-breaking sunshine saw footfall fall by an even bigger margin.”

“Climate change continues to deliver more and more extreme temperatures in the UK. Retailers are responding by investing in both mitigations – such as more air conditioning and more efficient refrigeration units – and in sustainability initiatives aimed at reducing carbon emissions. Unfortunately, business rates often punish stores for such investments, showing the need for government to look again at this broken system.”



Andy Sumpter
Head of Consulting & Analytics | EMEA | Sensormatic

“July saw UK retail footfall remain under pressure, with total visits down -2.1% year-on-year. While this represents an improvement on June’s -3.4%, the broader trend remains challenging, with six of the first seven months of 2026 performing worse than the same period last year. The exceptionally hot and historically dry weather is likely to have been a significant factor, discouraging shopping trips and particularly impacting High Streets.”

“England recorded the weakest performance of any UK nation at -3.0%, with London down -5.3%, highlighting the continued challenges facing larger urban centres during periods of extreme heat. There were, however, some positives. Retail Parks returned to growth and Shopping Centres also saw visits increase, suggesting consumers are still willing to visit destinations, even if they are making fewer retail trips once there.”

“While the UK has yet another new Prime Minister, retail is yet to experience any meaningful 'Burnham Bounce'. For retailers, the focus remains on converting these more selective visits into meaningful spend as the summer progresses.”



Executive Summary

July's footfall remained below last year's levels, though the decline was less severe than in June. The exceptionally hot weather continued to weigh on shopper activity, with High Streets most affected, while Retail Parks proved more resilient and returned to growth. Scotland remained the strongest-performing UK nation for a fourth consecutive month, while England lagged behind the rest of the UK. Within England, the East of England topped the regional rankings, while London remained the weakest-performing region. Overall, consumers continued to make fewer retail trips, but the improved performance compared with June suggests some stabilisation in footfall as the summer progressed.

Retail Footfall Index – July 2026

- Jul-26 vs Jul-25: YoY Footfall Volume [down 2.1%]
- Jul-26 vs Jun-26: MoM Footfall Recovery [up 1.3pp]
- 3-mth average: YoY Footfall Volume [down 2.7%]

↓ 2.1%
% change YoY

Footfall By Shopping Location:

Retail Park

- YoY: Footfall Volume [up 1.2%]
- MoM: Footfall Recovery [up 1.5pp]

↑ 1.2%
% change YoY

Shopping Centre

- YoY: Footfall Volume [down 1.4%]
- MoM: Footfall Recovery [up 1.1pp]

↓ 1.4%
% change YoY

High Street

- YoY: Footfall Volume [down 3.8%]
- MoM: Footfall Recovery [up 2.4pp]

↓ 3.8%
% change YoY

pp = percentage points
YoY = Year-on-Year
MoM = Month-on-Month

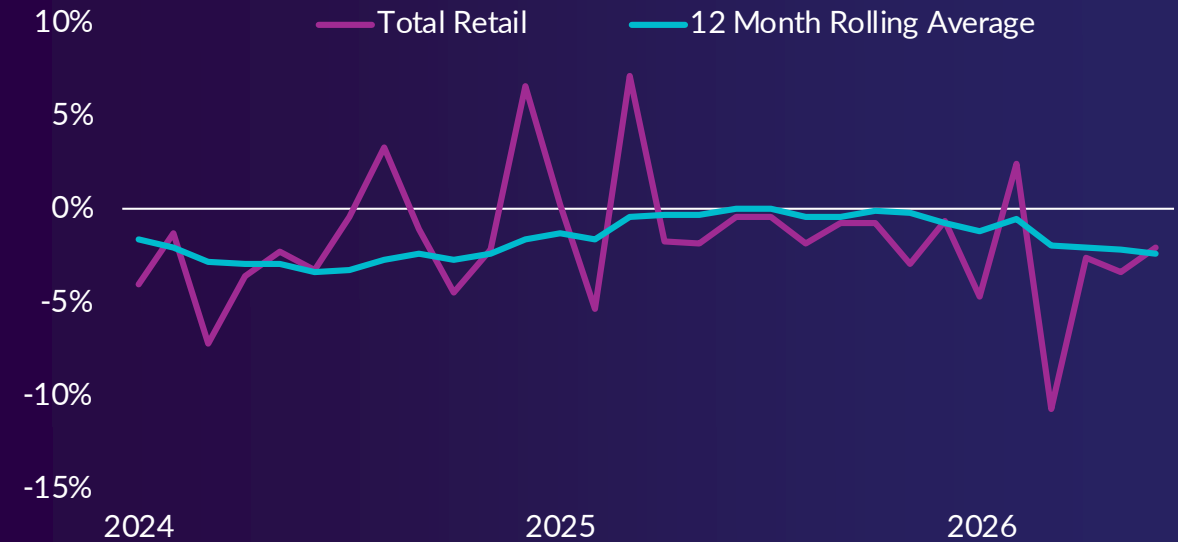


UK Total Retail (Month)

July 2026: **down 2.1%** (YoY)

- Footfall remained below last year's levels in July, though the 2.1% decline marked an improvement on June's 3.4% fall.
- Consumer demand remained subdued, with households continuing to balance spending priorities against ongoing cost pressures.
- Warm weather and seasonal events influenced shopping patterns, encouraging consumers to be selective about when and where they visited retail destinations.
- Shoppers continued to focus spending on planned purchases, with discretionary trips remaining under pressure across much of the month.
- Overall, July's performance suggests retail footfall remains on a soft footing, despite a modest improvement from the sharper decline recorded in June.

MONTHLY TOTAL UK RETAIL FOOTFALL (% CHANGE YOY)



Source: Sensormatic



UK Total Retail (July-26: Weeks 1-4)

Week 1: down 1.4% (YoY)

- July opened on a firmer footing than June, with footfall declines remaining relatively modest.
- Consumer demand remained cautious, though visits held up better than in many recent weeks.

Week 2: down 2.3% (YoY)

- Footfall softened mid-month as shoppers continued to prioritise essential and planned purchases.
- Rising household cost pressures continued to weigh on discretionary shopping trips.

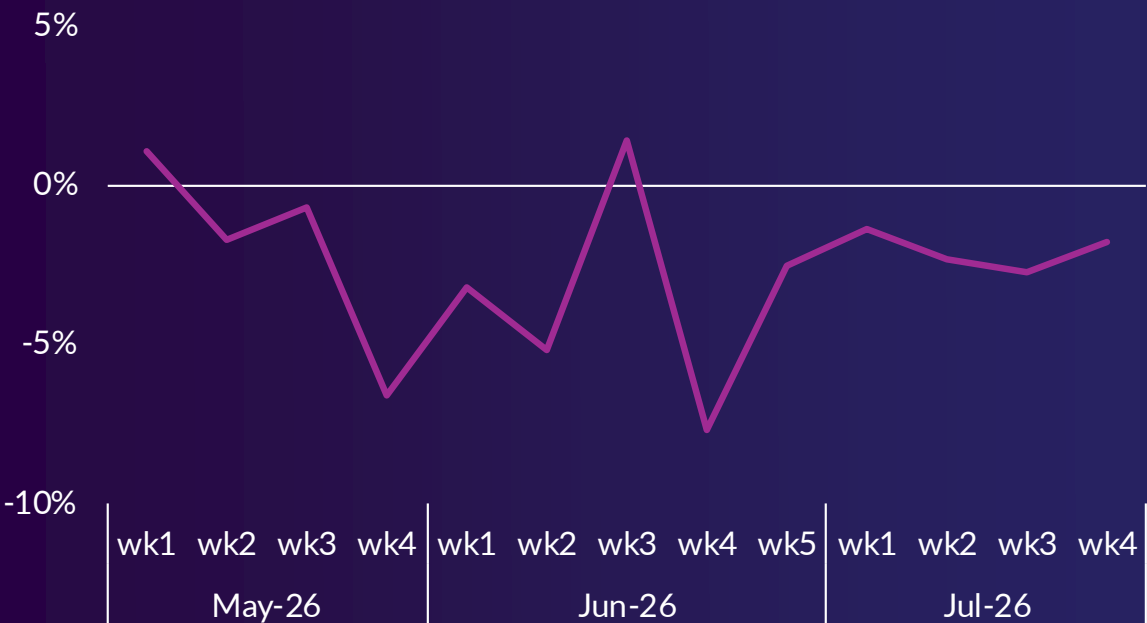
Week 3: down 2.7% (YoY)

- The month's weakest performance reflected subdued consumer activity and continued caution around spending.
- Retail destinations faced ongoing challenges in driving additional trips beyond necessity-led visits.

Week 4: down 1.8% (YoY)

- Footfall improved towards month-end, reversing some of the weakness seen earlier in July.
- The moderation in declines suggests consumer activity stabilised, although visits remained below year-ago levels.

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



Source: Sensormatic



UK Shopping Locations

Retail Park: up 1.2% (YoY)

- Retail Parks were the only location type to record growth in July, highlighting their continued resilience in a challenging trading environment.
- Consumers continued to favour convenient, value-led destinations, supporting footfall at retail parks despite broader weakness across retail.
- July's performance widened the gap between retail parks and other retail locations, reinforcing their position as the strongest-performing format during the month.

Shopping Centre: down 1.4% (YoY)

- Shopping Centre footfall remained below year-ago levels but outperformed high streets for a second consecutive month.
- The relatively modest decline suggests destination-led trips remained more resilient than routine high street visits.
- While shoppers remained selective, shopping centres continued to benefit from their broader mix of retail, leisure and hospitality offerings.

High Street: down 3.8% (YoY)

- High Streets recorded the steepest decline of any location type in July, although performance improved from June's sharper 6.2% fall.
- Consumer caution continued to weigh on discretionary and impulse trips, leaving town and city centre footfall under pressure.
- Despite some month-on-month improvement, high street performance remained notably weaker than both Retail Parks and Shopping Centres.

UK FOOTFALL BY LOCATION (% CHANGE YOY)



Source: Sensormatic



UK Nations

Scotland: up 2.7% (YoY)

- Recorded the strongest performance of all UK nations in July, with footfall remaining firmly above last year.
- Growth accelerated from June (+1.7%) to July (+2.7%), making Scotland the best-performing UK nation for a fourth consecutive month.
- Remains the only nation to have recorded positive footfall growth in each of the last three months.

Rank (YoY)



N Ireland: up 2.6% (YoY)

- Returned to growth in July, following a modest decline of 0.9% in June.
- Narrowly trailed Scotland, delivering the second-strongest performance among the UK's nations.
- July's result marked a notable improvement on recent months and moved footfall back above last year.



Wales: flat 0% (YoY)

- Footfall unchanged from last year, representing a significant improvement from June's 2.3% decline.
- Outperformed England and moved back to parity with last year.
- Despite remaining behind Scotland and Northern Ireland, Wales recorded its strongest result since March.

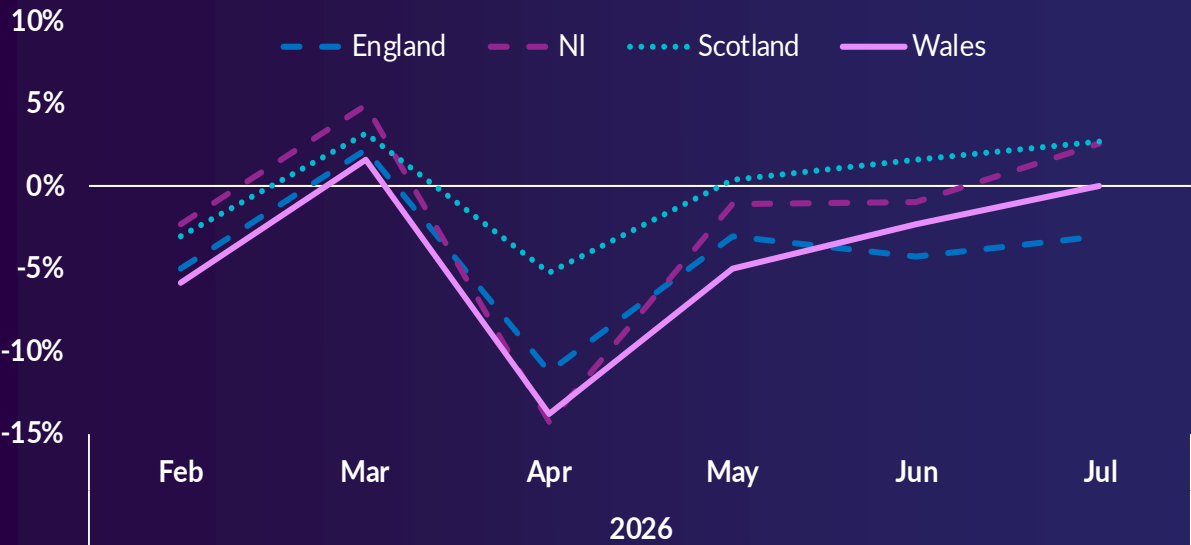


England: down 3.0% (YoY)

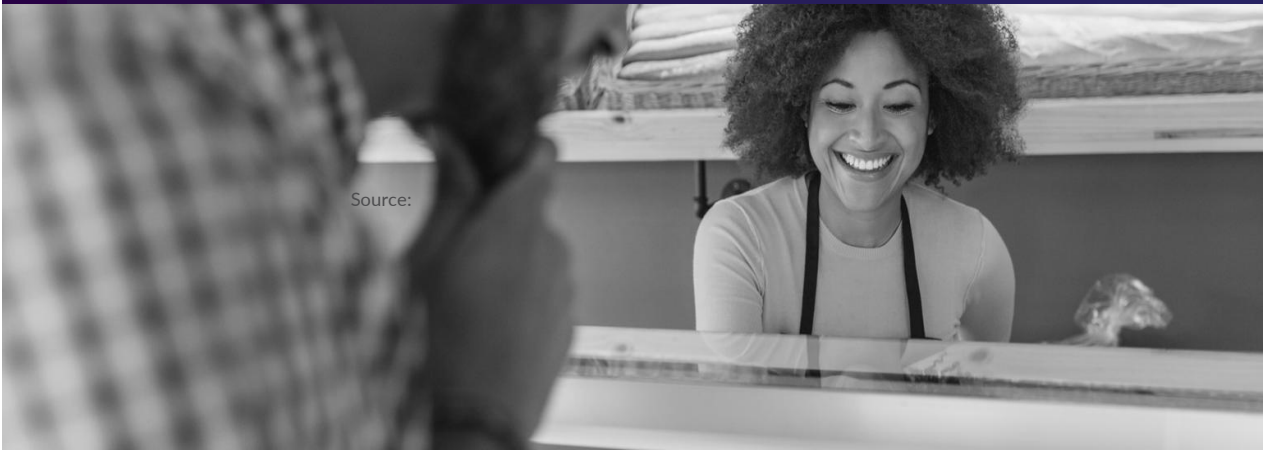
- Recorded the weakest performance of the UK's nations in July, with footfall remaining below last year.
- The decline eased from 4.3% in June to 3.0% in July, indicating some improvement in consumer activity.
- Despite the month-on-month improvement, England continued to lag the other UK nations.



NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



Source: Sensormatic



England Regional Rankings

Best Performing: East of England up 0.1% (YoY)

- The East of England was the only English region to record positive footfall growth in July, making it the strongest-performing region of the month.
- The region improved from a 3.1% decline in June to 0.1% growth in July, representing the largest month-on-month improvement of any English region.
- July's result lifted the East of England from fourth place in June's rankings to first place in July.
- In contrast to most English regions, footfall in the East of England returned to levels slightly above those seen a year earlier.

Worst Performing: London down 5.3% (YoY)

- London recorded the steepest decline of any English region in July, with footfall remaining 5.3% below last year.
- Despite remaining bottom of the regional rankings, London improved from a 6.8% decline in June to a 5.3% decline in July.
- London was one of only two English regions to record a decline of more than 5% in July, alongside the South East (-5.1%).
- The capital remained the weakest-performing English region for a second consecutive month.

*Customers of Sensormatic can contact Sensormatic directly to request additional information, including a detailed breakdown of footfall data by city.

	Jul-26	Jun-26	Jul-26 rank	Jun-26 rank	Rank Change
East of England	+0.1%	-3.1%	1	4	↑ +3
West Midlands	-0.4%	-3.8%	2	5	↑ +3
East Midlands	-0.9%	-4.1%	3	6	↑ +3
North West England	-1.2%	-2.2%	4	2	↓ -2
South West England	-2.5%	-4.1%	5	6	↑ +1
North East England	-2.9%	-1.3%	6	1	↓ -5
Yorkshire and the Humber	-4.1%	-2.4%	7	3	↓ -4
South East England	-5.1%	-5.9%	8	8	→ 0
London	-5.3%	-6.8%	9	9	→ 0

Source: Sensormatic

Methodology

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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