BRC

Sensormatic
by **Johnson Controls**

Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC FOOTFALL MONITOR

September 2024

Period covered:
25 August 2024 – 28 September 2024

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"Footfall rose for the first time in over a year as mild temperatures combined with weak footfall last year led to strong growth in September. It was neither too hot nor too cold for customers, leaving retailers in the sweet spot for additional shopping trips. This compared positively to last year when the intense heatwave caused many people to stay home and delay purchases of autumnal clothes and products. Retail parks continued to perform particularly well as the increased rain drove some people towards shopping areas with nearby parking."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic

"September saw a long-awaited positive uptick in footfall, with total shopper numbers returning the first positive year-on-year performance since July 2023. While the High Street and Shopping Centres saw improvements compared to last year, Retail Parks were once again the standout shopping destination, with their tenant mix of out-of-town supermarkets and discount retail offerings helping to drive shopper traffic. This September's growth is built on last year's suppressed footfall from September 2023's heatwave. While retailers will welcome the boost, hoping that this translates into sales, many will still be eyeing it with caution."

Executive Summary

September was divided by three strong weeks to start, followed by two weeks of rain, but overall came out as the best performing month YoY in the last 18 months. This was helped by annualizing against a weak September last year that had a late-season extreme heat wave that kept people indoors and delayed seasonal purchases, which affected the south of England, in particular. The highest total footfall came in week 1 for Back-to-School, but week 2 was the best performing week YoY since March 2023

Retail Footfall Index – September 2024

- Footfall up **3.3**% YoY
- Compared to August: Change in YoY footfall up by **3.7** percentage points
- Rolling 3-mth average: down **0.4**% YoY, but up 1.6 percentage points from Jun-Aug's average

UP **3.3%**
% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- Sep-24: footfall up **0.9**% YoY
- Compared to prior month: Change in YoY footfall up by 1.2 percentage points

UP **0.9%**
% change YoY

Retail Parks

- Sep-24: footfall up 7.3% YoY
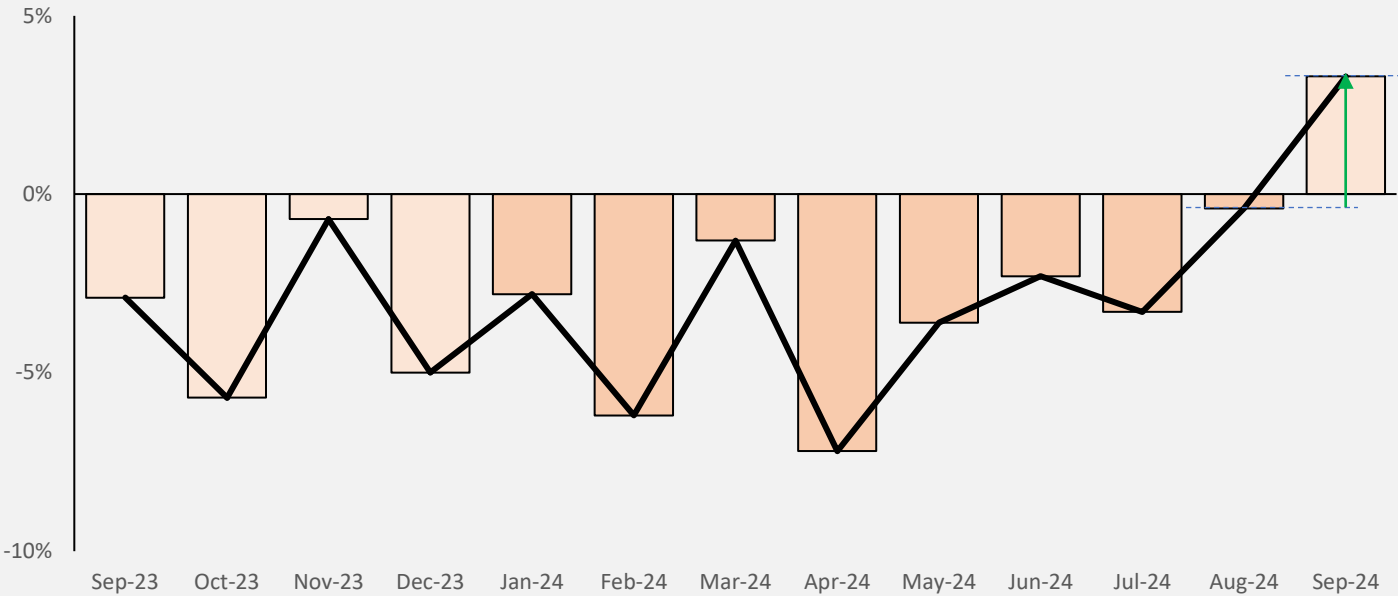- Compared to prior month: Change in YoY footfall up by 4.7 percentage points

UP **7.3%**
% change YoY

Shopping Centres

- Sep-24: footfall up 2.3% YoY
- Compared to prior month: Change in YoY footfall up by 4.1 percentage points

UP **2.3%**
% change YoY

UK RETAIL FOOTFALL
BRC - Sensormatic Footfall Monitor

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

Monthly UK Total Retail Footfall: 2024

Footfall rose for the first time in over a year, helped by a weak month in 2023

- **UK total retail footfall was up by 3.3% year-on-year** in September 2024

- This was up by **3.7 percentage points (pp)** compared to **August 2024**

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

  - **Last Year's Heatwave:** 2023's late extreme heatwave kept people indoors and delayed autumn and winter clothing sales, driving footfall during weeks 2 and 3 last year down by 8.5% and 6.1%, respectively, compared to 2022. With good weather this year, those weeks were up by 12.6% and 7.0% vs last year

  - **Heavy Rains, Weather Warnings:** The final two weeks of September brought such heavy rain that several counties broke records for rainfall, which put a damper on the gains from the previous weeks
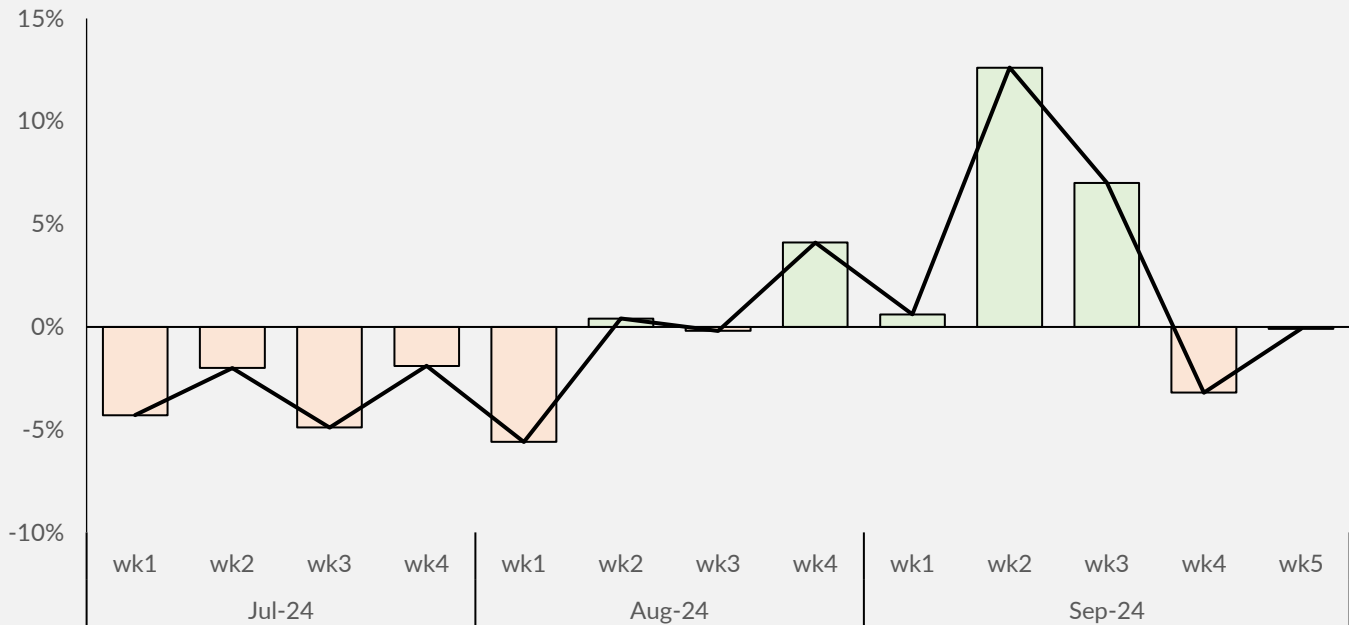
UK Total Retail

Aug-24

Up 3.3%
Year-on-Year

3-month rolling average

Down 0.4%
Year-on-Year

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

UK WEEKLY FOOTFALL

- September consists of 5 calendar weeks

- With back-to-school shopping, week 1 had the highest total footfall, but was mostly on par (+0.6%) with last year

- Week 2 dropped off by 14% from week 1 in total footfall, but due to last year's heatwave delaying typical autumnal shopping, this year was +12.6%, the best performing week YoY in 18 months

- Week 3 was also strong compared to last year, at +7.0%

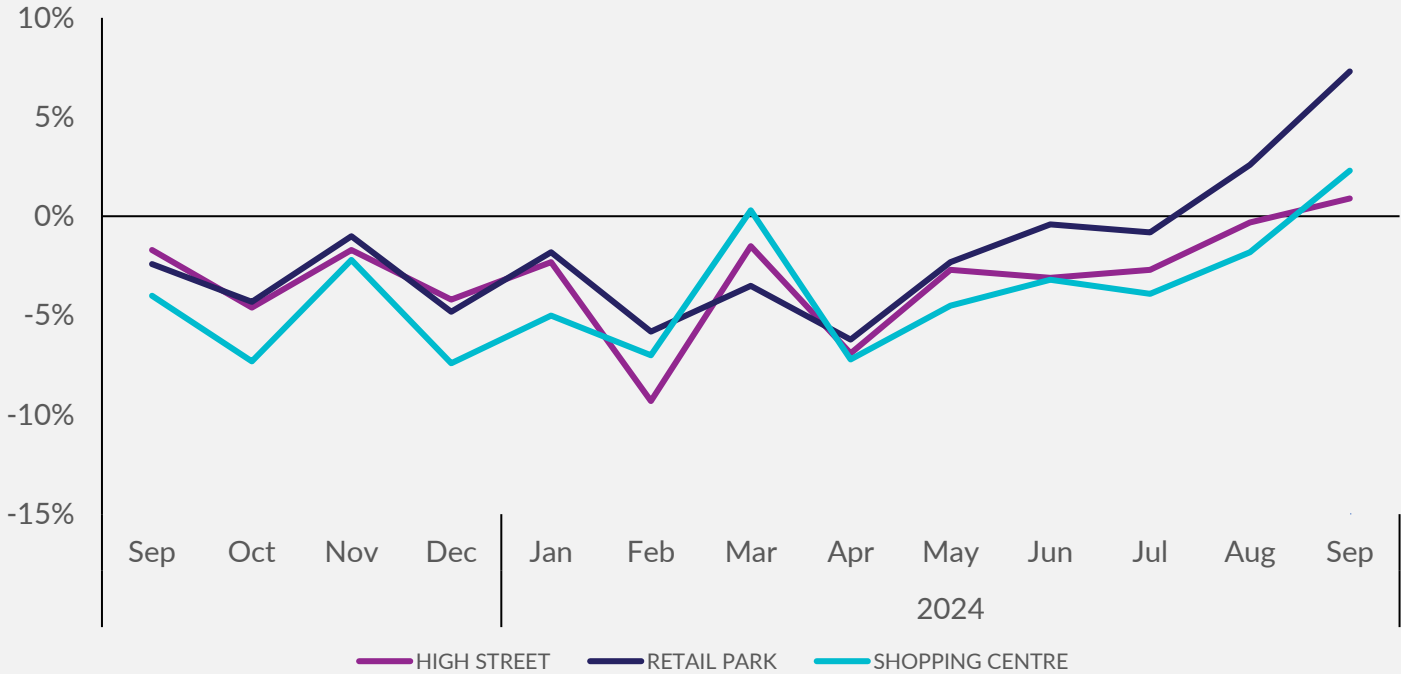- The final couple of weeks dropped off due to the heavy rain and thunderstorms

BEST PERFORMING WEEK

Week Two

Up 12.6%
Year-on-Year

WORST PERFORMING WEEK

Week Four

Down -3.2%
Year-on-Year

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

HIGH STREET — RETAIL PARK — SHOPPING CENTRE

Retail Parks saw a huge YoY Increase

- **Shopping Centre:**
  - **Footfall up ↑2.3% YoY**
  - Compared to prior month: Change in YoY footfall ↑4.1 pp

- **High Street:**
  - **Footfall up ↑0.9% YoY**
  - Compared to prior month: Change in YoY footfall ↑1.2 pp

- **Retail Park:**
  - **Footfall up ↑7.3% YoY**
  - Compared to prior month: Change in YoY footfall ↑4.1 pp

Footfall over the last 12 months:

- For the first time since July 2023, all three locations saw positive growth in footfall compared to the prior year
- Retail parks had their best ever YoY performance at +7.3%. Since we started tracking them in January 2023, the previous high was +4.6% in February 2023
- High Streets saw the most modest growth at +0.9%, which was the first time it's been positive in more than a year

Shopping Centre

Up 2.3%

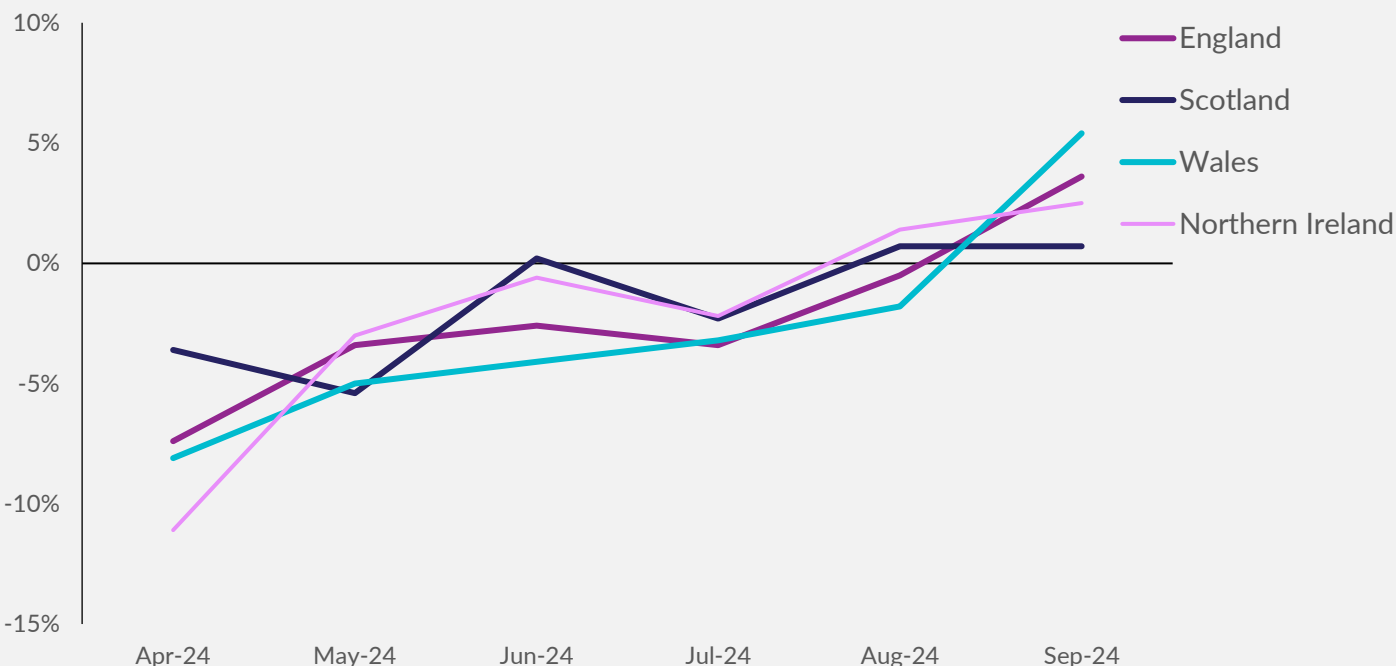Year-on-Year

High Street

Up 0.9%

Year-on-Year

Retail Park

Up 7.3%

Year-on-Year

UK TOTAL FOOTFALL BY REGION
BRC - Sensormatic Footfall Monitor

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)

Legend: England, Scotland, Wales, Northern Ireland

UK NATIONS

Footfall Country Rank (YoY)

Wales:
- **Sep-24 : footfall up ↑5.4% YoY**
- Compared to prior month: Change in YoY footfall ↑7.2 pp
- Wales has risen to the top of the chart for the first time since November 2023 and the best performance since March 2023

Up **5.4%**

England:
- **Sep-24 : footfall up ↑3.6% YoY**
- Compared to prior month: Change in YoY footfall ↑4.1 pp
- Second place and best performance since March 2023

Up **3.6%**

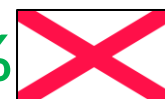**Northern Ireland:**
- **Sep-24 : footfall up ↑2.5% YoY**
- Compared to prior month: Change in YoY footfall ↑1.1 pp
- Third, but still the best numbers in the last 6 months

Up **2.5%**

Scotland:
- **Sep-24: footfall up ↑ 0.7% YoY**
- Compared to prior month: Change in YoY footfall flat
- Fourth, but has had positive growth in 3 of the last 4 months

Up **0.7%**

UK FOOTFALL BY ENGLISH REGION
BRC - Sensormatic Footfall Monitor

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

English Region	Sep-24	Aug-24	Sep-24 rank	Aug-24 rank	Change in Rank
South East England	+5.2%	-0.4%	1	5	⬆ 4
East of England	+4.7%	–	2	3	⬆ 1
North West England	+4.7%	+0.7%	3	2	⬇ -1
South West England	+4.6%	-1.7%	4	8	⬆ 4
Yorkshire and the Humber	+4.2%	-2.2%	5	9	⬆ 4
East Midlands	+3.6%	-0.1%	6	4	⬇ -2
West Midlands	+3.0%	-0.8%	7	7	➡ 0
London	+2.5%	+0.8%	8	1	⬇ -7
North East England	+1.1%	-0.5%	9	6	⬇ -3

ENGLISH REGIONAL RANKINGS

Highest YoY

- **South East England: footfall up ↑5.2% YoY**
- Compared to prior month: Change in YoY footfall ↑5.6 pp
- First positive performance since July 2023.

Lowest YoY

- **North East England: footfall up ↑1.1% YoY**
- Compared to prior month: Change in YoY footfall ↑1.6 pp
- Although at the bottom of the table this month, this represents the best performance in more than a year.

Highest YoY
South East England
Up 5.2%

Lowest YoY
North East England
Up 1.1%

UK FOOTFALL BY CITY
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City	Sep-24	Aug-24	Sep-24 rank	Aug-24 rank	Rank Change
Leeds	+6.9%	-1.5%	1	6	⬆5
Bristol	+5.0%	-4.2%	2	10	⬆8
Cardiff	+3.9%	-4.1%	3	9	⬆6
Belfast	+3.7%	-0.2%	4	3	⬇-1
Manchester	+3.4%	-1.4%	5	5	➡0
Edinburgh	+2.8%	+2.6%	6	1	⬇-5
Nottingham	+2.6%	-3.6%	7	8	⬆1
London	+2.5%	+0.8%	8	2	⬇-6
Liverpool	+1.8%	-1.9%	9	7	⬇-2
Birmingham	-0.1%	-8.1%	10	11	⬆1
Glasgow	-1.0%	-0.6%	11	4	⬇-7

UK CITIES RANKINGS

Major Cities:
- **Major City Average: ↑2.9% YoY**
- Compared to prior month: Change in YoY footfall ↑4.9 pp
- City average in positive territory for the first time since August 2023.

City: Best YoY change
- **Leeds - Up ↑6.9% YoY**
- Compared to prior month: Change in YoY footfall ↑8.4 pp
- Highest YoY numbers since January 2023.

City: Worst YoY change
- **Glasgow - down ↓1.0% YoY**
- Compared to prior month: Change in YoY footfall ↓0.4 pp
- Glasgow and Birmingham were the only cities in negative territory.

Best YoY Improvement
Leeds
Up 6.9%

Worst YoY Fall
Glasgow
Down 1.0%

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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