BRC

Sensormatic

by **Johnson Controls**

BRC-SENSORMATIC FOOTFALL MONITOR

May 2025

Period covered:
04 - 31 May 2025

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"Despite favourable weather throughout May, footfall took a disappointing turn last month, following a more promising start to the year. While stock markets stabilised, higher household bills depressed consumer sentiment and the appetite to visit retail stores. Retail Parks performed the best of all locations, though only registering a slight uptick in shopper traffic. There was also positive news in the North West, as Manchester's string of summer activities solidified its position as one of the top-performing English cities.

"Retailers work hard to deliver vibrant, engaging shopping experiences that attract customers and boost footfall across the UK. However, the Chancellor's 2024 Budget added £5 billion to the industry's costs, hampering their ability to do so. The Government must now ensure that upcoming reforms to business rates to be announced in the 2025 Budget leave no shop paying more. These reforms should support and incentivise, rather than penalise, the investment needed to revitalise our high streets and town centres."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic

"May's footfall figures showed a modest decline, with total UK retail visits down -1.7% year-on-year. High Streets and Shopping Centres saw similar drops of -2.5% and -2.3% respectively, while Retail Parks edged up slightly by +0.2%, continuing to demonstrate their resilience.

"Despite the warm and sunny weather—more typical of peak summer than late spring—footfall didn't quite follow suit, suggesting that consumers may have favoured outdoor leisure over shopping. Still, May's result is a marked improvement on the -3.6% seen in the same month last year and reflects a more stable trend in 2025 overall.

"Encouragingly, consumer sentiment has shown signs of improvement, with more shoppers feeling optimistic about their personal finances and the wider economy. Notwithstanding ongoing cost pressures, retailers will be looking to make hay while the sun shines—focusing on the right mix of experience, value, and convenience to convert seasonal footfall into sustained growth."

Executive Summary

Retail footfall declined in May compared to the same period last year, following a strong performance in April that was boosted by Easter-related shopping and promotions. As that seasonal uplift faded, consumer visits to stores dropped, particularly on High Streets and in Shopping Centres. Inflation and more cautious household spending likely dampened demand, while mixed weather conditions may have discouraged in-person shopping. Retail Parks, however, proved more resilient, recording a slight increase in footfall amid the overall slowdown.

Retail Footfall Index – May 2025

- vs May 2024:   YoY Footfall Volume **declined ↓1.7%**

- vs 3-mth average 2024:   YoY Footfall Volume **declined ↓0.2%**

- vs April 2025:   MoM Footfall Recovery **declined ↓8.9pp**

down 1.7%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

Retail Park
- vs May 2024:   YoY Footfall Volume **improved ↑0.2%**

- vs April 2025:   MoM Footfall Recovery **declined ↓7.3pp**

up 0.2%
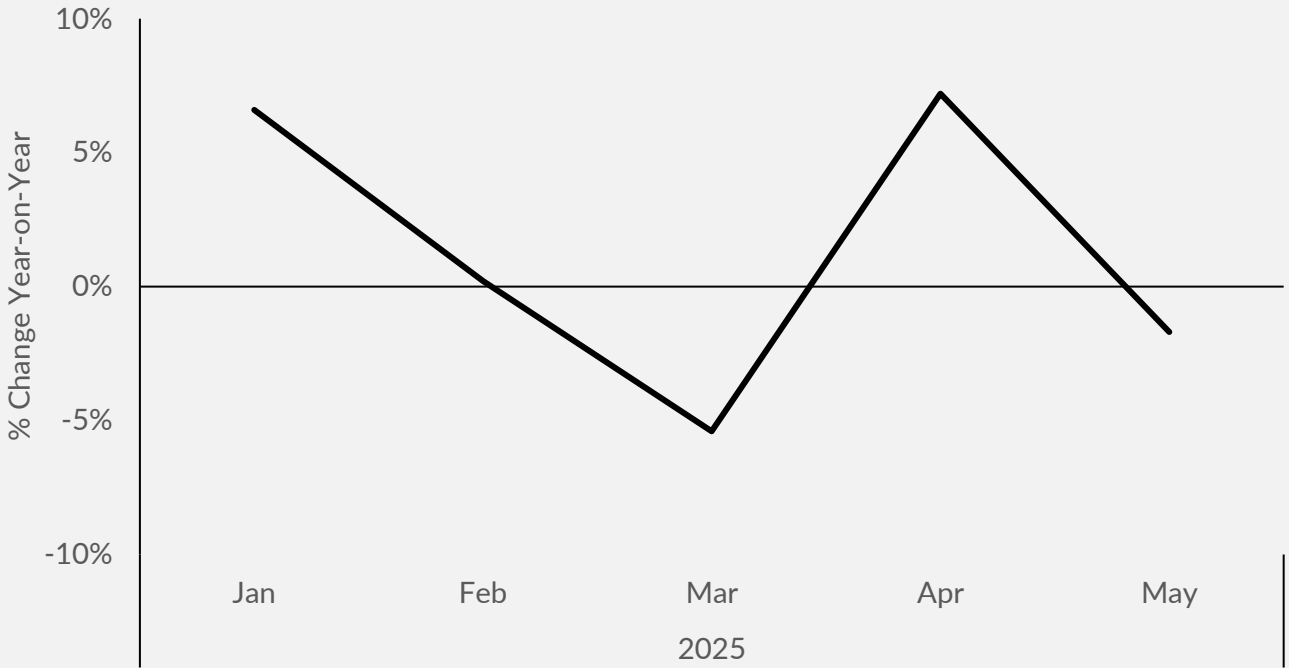% change YoY

Shopping Centre
- vs May 2024:   YoY Footfall Volume **declined ↓2.3%**

- vs April 2025:   MoM Footfall Recovery **declined ↓7.9pp**

down 2.3%
% change YoY

High Street
- vs May 2024:   YoY Footfall Volume **declined ↓2.5%**

- vs April 2025:   MoM Footfall Recovery **declined ↓7.8pp**

down 2.5%
% change YoY

pp = percentage points

UK RETAIL FOOTFALL – BY MONTH
BRC - Sensormatic Footfall Monitor

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

UK Total Retail (Month YoY)

- In May 2025, UK retail footfall declined by 1.7% year-on-year, a modest drop compared to the more dramatic fall seen in March.

- While the decline is relatively small, it contrasts with the strong growth seen in April and January, highlighting a shift in consumer activity.

- January typically sees a spike from post-Christmas sales, drawing shoppers back to stores.

- The sharp growth in April can likely be attributed to Easter falling within that month, which typically boosts retail activity through increased holiday shopping and leisure outings.

- February remained broadly flat, showing limited movement.

- May's subdued footfall may point to underlying economic pressures such as high living costs or cautious consumer sentiment as discretionary spending tightens.

- Compared to the more buoyant months earlier in the year, May reflects a return to more cautious shopping behaviour, hinting that any gains seen earlier might not be sustained without continued promotional or seasonal triggers.
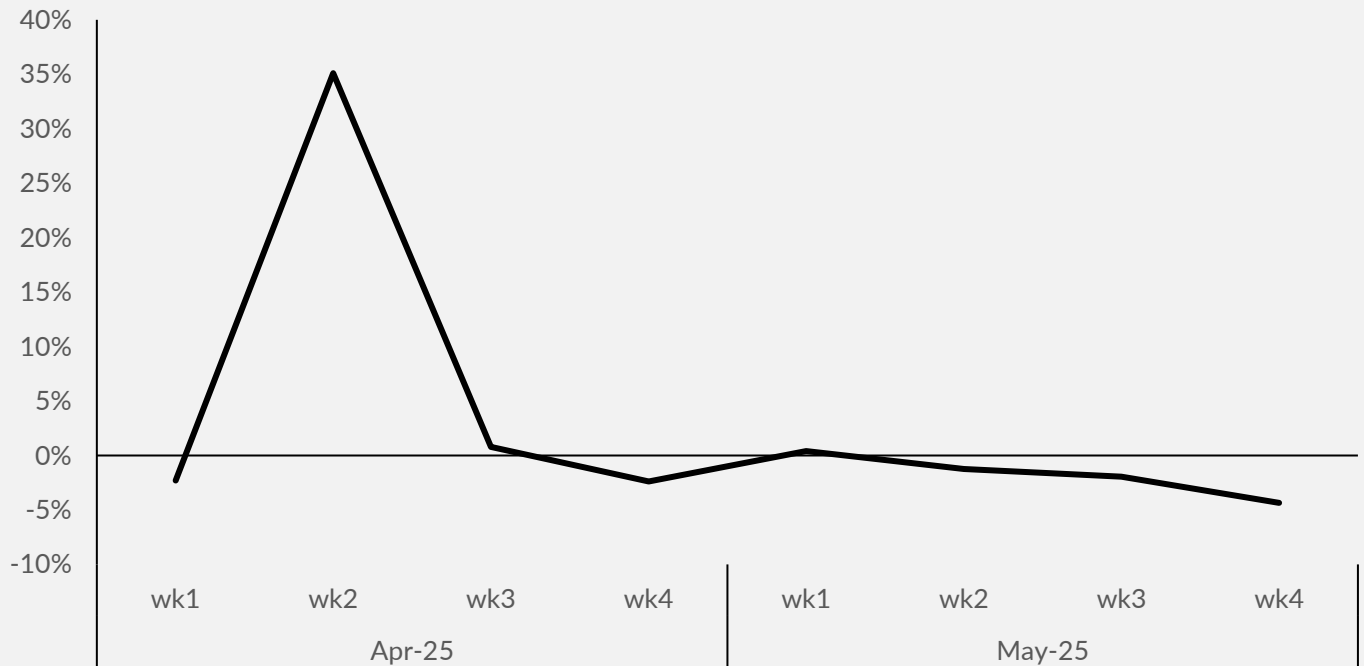
UK Total Retail
May-25
↓1.7%
Year-on-Year

Mar-25 to May-25
[3-month average]
↓0.2%
Year-on-Year

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

UK Total Retail (Week YoY)

Week 1: ↑0.4% (YoY)
- Footfall saw a modest uplift, supported by the early May bank holiday on Monday 5 May. However, the limited growth suggests restrained consumer spending and growing competition from leisure activities.

Week 2: ↓1.3% (YoY)
- Retail footfall dipped slightly as activity normalised post-bank holiday, with no major events to drive visits. Shoppers may have pulled spending forward or diverted to other non-retail pursuits.

Week 3: ↓1.9% (YoY)
- The downward trend continued amid a lack of promotional or seasonal retail triggers. Warmer weather and shifting habits likely drew consumers away from physical shopping destinations.

Week 4: ↓4.4% (YoY)
- Footfall fell more sharply in the final week of May, reflecting reduced consumer engagement. Tightening budgets and a quiet event calendar contributed to the decline.

May-25 TOP WEEK
Week One
↑0.4%
Year-on-Year

May-25 BOTTOM WEEK
Week Four
↓4.4%
Year-on-Year

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

UK Shopping Locations

Retail Park:
- Highest YoY growth compared to other 2 locations for the 14th consecutive month.
- Their resilience is likely due to easy car access, free parking, and a balanced retail mix that includes essential stores like supermarkets and DIY outlets alongside discretionary retailers, which keeps footfall more stable even when consumer confidence wavers.

Retail Park
↑**0.2%**
Year-on-Year

Shopping Centre:
- Challenges may stem from a heavy reliance on planned, discretionary shopping trips and seasonal peaks, combined with shifting consumer habits toward convenience-led formats and more cautious spending.

Shopping Centre
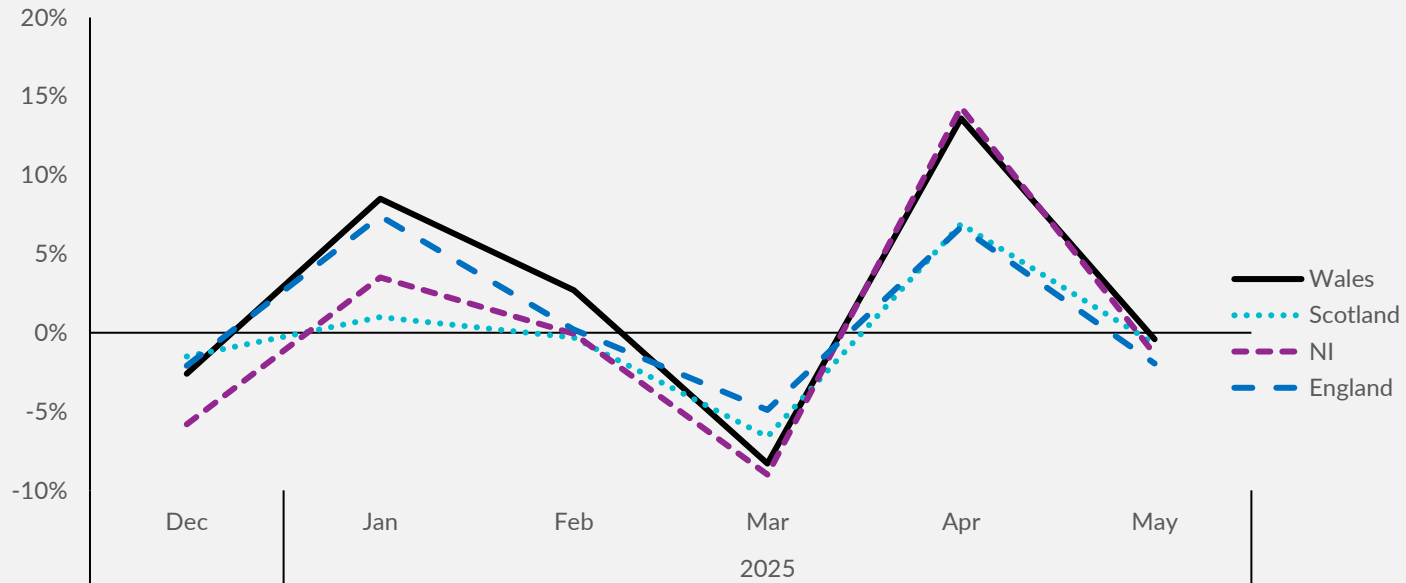↓**2.3%**
Year-on-Year

High Street:
- For the second consecutive month, high streets experienced the largest YoY decline among the three locations.
- May's decline may reflect reduced consumer confidence and a lack of major events or promotions to draw shoppers back to town centres.

High Street
↓**2.5%**
Year-on-Year

UK NATION RETAIL FOOTFALL - BY MONTH

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NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)

— Wales
···· Scotland
--- NI
--- England

UK Nations

Footfall Country Rank (YoY)

Wales: ↓0.4% (YoY)
- May's small decline follows a strong April uplift driven by Easter timing, indicating a seasonal pullback as footfall normalizes after the holiday boost.

Scotland: ↓0.7% (YoY)
- May decline was smaller than England and Northern Ireland's, reflecting more stable footfall following Easter.

Northern Ireland: ↓1.4% (YoY)
- May saw a modest footfall decline, slightly larger than Scotland and Wales but less pronounced than England, reflecting cautious consumer spending and softer demand.

England: ↓2.0% (YoY)
- May saw the weakest improvement for the second consecutive month, compared to other nations.

ENGLAND REGION FOOTFALL – BY MONTH
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TOTAL FOOTFALL BY REGION (% CHANGE YEAR-ON-YEAR)

	Apr-25	May-25	Apr-25 rank	May-25 rank	Rank Change
North West England	+8.5%	+0.8%	3	1	⬆2
West Midlands	+11.4%	-0.6%	1	2	⬇-1
North East England	+5.8%	-0.7%	6	3	⬆3
South West England	+8.9%	-1.3%	2	4	⬇-2
East Midlands	+6.4%	-2.1%	5	5	➡0
South East England	+7.9%	-2.8%	4	6	⬇-2
Yorkshire and the Humber	+4.0%	-2.8%	9	6	⬆3
London	+4.2%	-3.2%	8	8	➡0
East of England	+4.3%	-3.7%	7	9	⬇-2

England Regional Rankings

NW England

- Improved rank from 3rd in April to 1st in May, +2 rank change.
- Growth in May after a strong April.
- The North West's resilience might be driven by local economic factors such as stronger consumer confidence or ongoing investments. It suggests sustained demand and possibly better adaptation to seasonal or market changes than other regions.

East of England

- Rank dropped from 7th in April to 9th (bottom) in May, -2 rank change.
- May YoY decline reflects a combination of housing market cooling, restrained business investment, agricultural sector pressures, and labour market challenges. These factors collectively dampen consumer spending and business activity, causing the region to underperform compared to others .

Highest YoY
NW England
↑0.8%
Year-on-Year

Lowest YoY
East of England
↓3.7%
Year-on-Year

UK CITY FOOTFALL – BY MONTH
BRC - Sensormatic Footfall Monitor

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

	Apr-25	May-25	Apr-25 rank	May-25 rank	Rank Change
Manchester	+10.0%	+3.9%	4	1	⬆3
Birmingham	+11.8%	+1.5%	2	2	➡0
Edinburgh	+8.1%	+1.1%	6	3	⬆3
Leeds	+3.5%	-1.1%	9	4	⬆5
Glasgow	+7.8%	-1.2%	7	5	⬆2
Belfast	+21.3%	-1.9%	1	6	⬇-5
Cardiff	+9.0%	-2.1%	5	7	⬇-2
Nottingham	+3.2%	-2.5%	10	8	⬆2
Liverpool	+10.5%	-3.0%	3	9	⬇-6
London	+4.2%	-3.2%	8	10	⬇-2
Bristol	+1.3%	-4.0%	11	11	➡0

UK City Rankings

Major Cities:

- Most cities experienced year-on-year footfall decreases across the country.

Manchester
- Only major city improving both in growth and rank
- Could reflect economic resilience, strong labour market, or new business openings.
- Likely benefiting from infrastructure investments or cultural/tourism activities boosting activity in May.

Bristol
- The decline in May signals a meaningful slowdown or contraction following weak growth in April.
- Economic pressures (inflation, cost of living), sector-specific challenges (tech and construction), and potential seasonal factors likely contribute.
- Worst performing city for the third consecutive month.

Best Performing City
MANCHESTER
↑**3.9%**
Year-on-Year

Worst Performing City
BRISTOL
↓**4.0%**
Year-on-Year

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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