Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC FOOTFALL MONITOR

February 2025

Period covered:
02 February 2025 – 01 March 2025

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

“Footfall increased for the second consecutive month, with retail parks continuing to outperform other retail destinations. The variety of larger retail outlets and the option of free parking enticed customers to visit retail parks over their local high street or shopping centre which saw only marginal improvements. Strong investment in retail parks and fewer empty stores has led to consistent positive shopper traffic over the past year.

“Retailers are always looking for ways to invest in shopping destinations and the communities they serve. Unfortunately, the £7 billion worth of costs facing the industry from the Budget will hinder retailers’ ability to do this. At a time when many high streets are in desperate need of revitalisation, the government must do more to support the retail industry’s ability to invest. Ensuring no shop pays more as a result of business rates reform and delaying the new packaging levy would allow for more investment in stores and jobs, giving footfall a better chance of recovery in 2025.”

Andy Sumpter | Retail Consultant – EMEA | Sensormatic

“After January’s jump-start, retail footfall in February stalled, with retailers seeing only the slimmest improvements compared to 2024 last month. While the good news is that shopper counts remained steady, many would have been hoping for a more substantial leap building off a strong start to the year. Retail Parks, consistently one of the top performers in 2024, once again outstripped other retail destinations in February, as the convenience and choice built into their retail offerings again proved popular with customers. With Easter falling late and well into April this year, this will, undoubtedly, put added pressure on retailers as we head into March. To plug the gap, retailers have an opportunity to create compelling reasons to visit and enhance their offerings with greater convenience and choice, which have been the standout strengths of Retail Park performance.”

Executive Summary

February 2025 showed a modest increase in retail footfall, reflecting a slowdown in the recovery seen in the previous month. While January experienced a strong rebound, February's growth suggests a tapering of the post-holiday boost, with footfall stabilising. Despite the slower growth, February still marks an improvement over the declines seen throughout most of 2024 , indicating a gradual recovery in footfall.

Retail Footfall Index – February 2025

- Footfall volume compared to Feb-24:
    - Improved ↑0.2%
- Footfall recovery compared to prior month, Jan-25:
    - Fell ↓6.4pp
- Footfall volume 3-mth average (Dec-24 to Feb-25)
    - Improved ↑1.0%

up 0.2%

% change YoY

FOOTFALL BY SHOPPING LOCATION:

Retail Park

- Footfall volume (YoY):
    - vs Feb-24: Improved ↑2.0%
- Footfall recovery (MoM):
    - vs Jan-25: Fell ↓5.9pp

up 2.0%

% change YoY

Shopping Centre

- Footfall volume (YoY)
    - vs Feb-24: Improved ↑0.1%
- Footfall recovery (MoM):
    - vs Jan-25: Fell ↓7.3pp

up 0.1%

% change YoY

High Street

- Footfall volume (YoY):
    - vs Feb-24: Improved ↑0.1%
- Footfall recovery (MoM):
    - vs Jan-25: Fell ↓4.4pp

up 0.1%

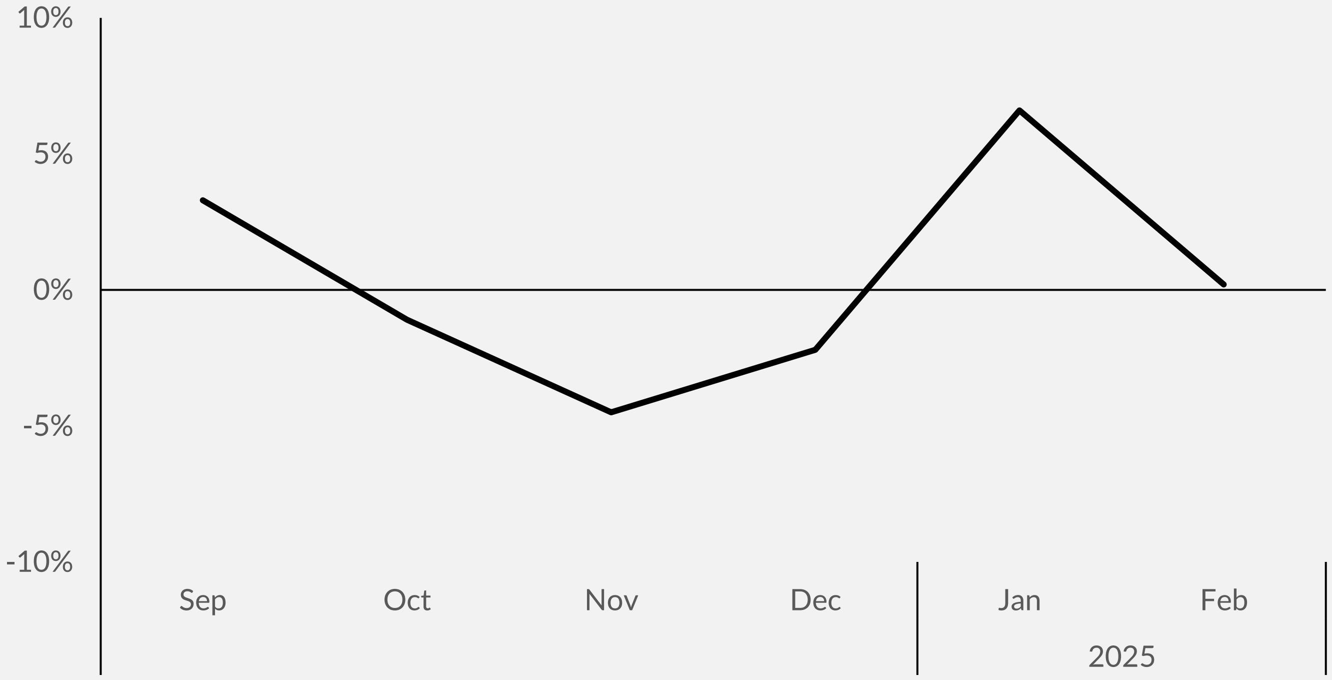
% change YoY

pp = percentage points

UK RETAIL FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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



UK Retail Footfall Feb recovery is slower than Jan, but still positive

- In Feb-25, there was a modest increase in retail footfall volume compared to Jan-25, with a YoY growth of 0.2%
- Jan-25 saw the highest YoY increase in the last 6 months, which was a strong rebound after the negative months in October to December
- Feb-25's small increase reflects a gradual stabilisation following the larger rebound in Jan-25, after the post-holiday boost. While it doesn't show the same significant uptick as January, it still signals that footfall volumes are holding steady or growing slightly despite the challenges faced in the months before
- This indicates that retailers may be experiencing early positive trends in the year, though the pace of recovery is slower compared to the initial surge seen in January

UK Total Retail

Feb-25

up ↑0.2%

Year-on-Year

Dec-24 to Feb-25

[3-month average]

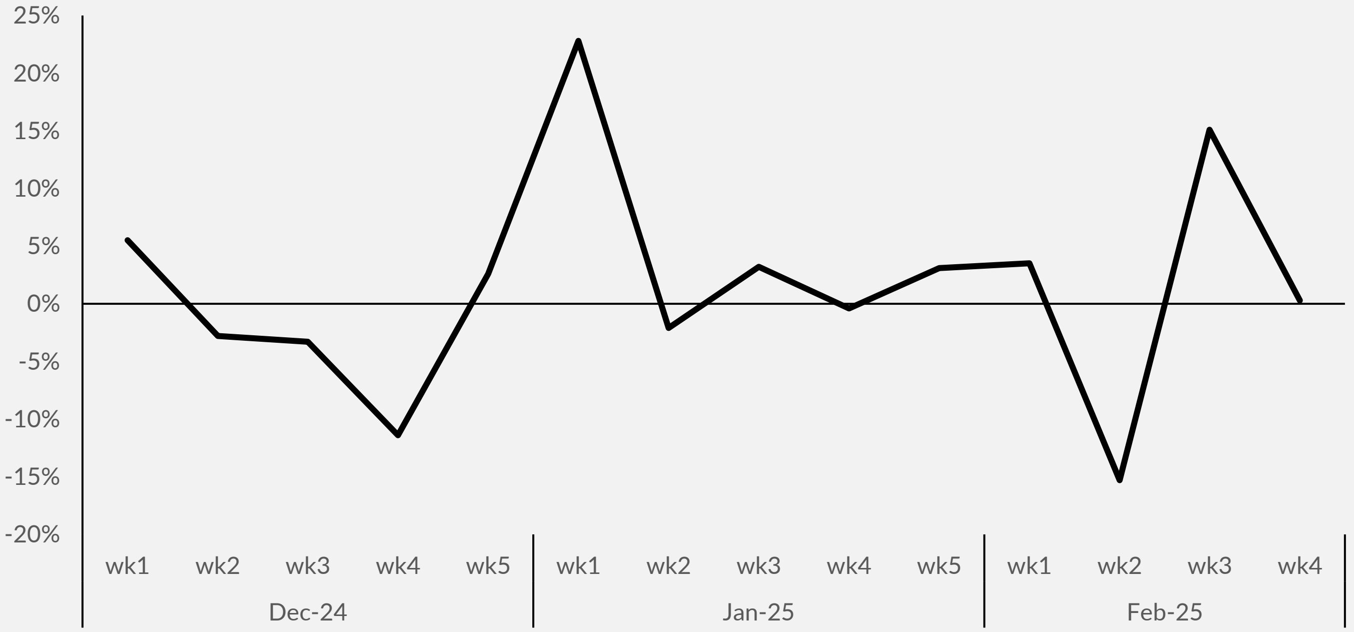
up ↑1.0%

Year-on-Year

UK RETAIL FOOTFALL – BY WEEK

BRC - Sensormatic Footfall Monitor

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



Three of the four weeks in February showed positive YoY growth

Week 1 YoY: improved ↑3.5%

- Retail footfall increased which may suggest that during wk1, footfall is relatively stable, potentially due to factors like post-holiday retail events or promotions.

Week 2 YoY: fell ↓15.3%

- Falls within the typical timeframe for school half-term holidays in many regions, which could have contributed to the significant decline in footfall. Families often take holidays or stay home during this period, reducing foot traffic in retail areas.

Week 3 YoY: improved ↑15.1%

- Conversely, wk3's increase might reflect a rebound in shopper activity post-half-term, as consumers return to shopping routines after the break.

Week 4 YoY: improved ↑0.3%

- The YoY growth in wk4 is relatively small, indicating that footfall has remained almost stable compared to last year. This suggests that wk4 could be a transitional period between more significant changes in footfall, possibly driven by general market conditions

FEB-25 TOP WEEK

Week Three

up ↑15.1%

Year-on-Year

FEB-25 BOTTOM WEEK

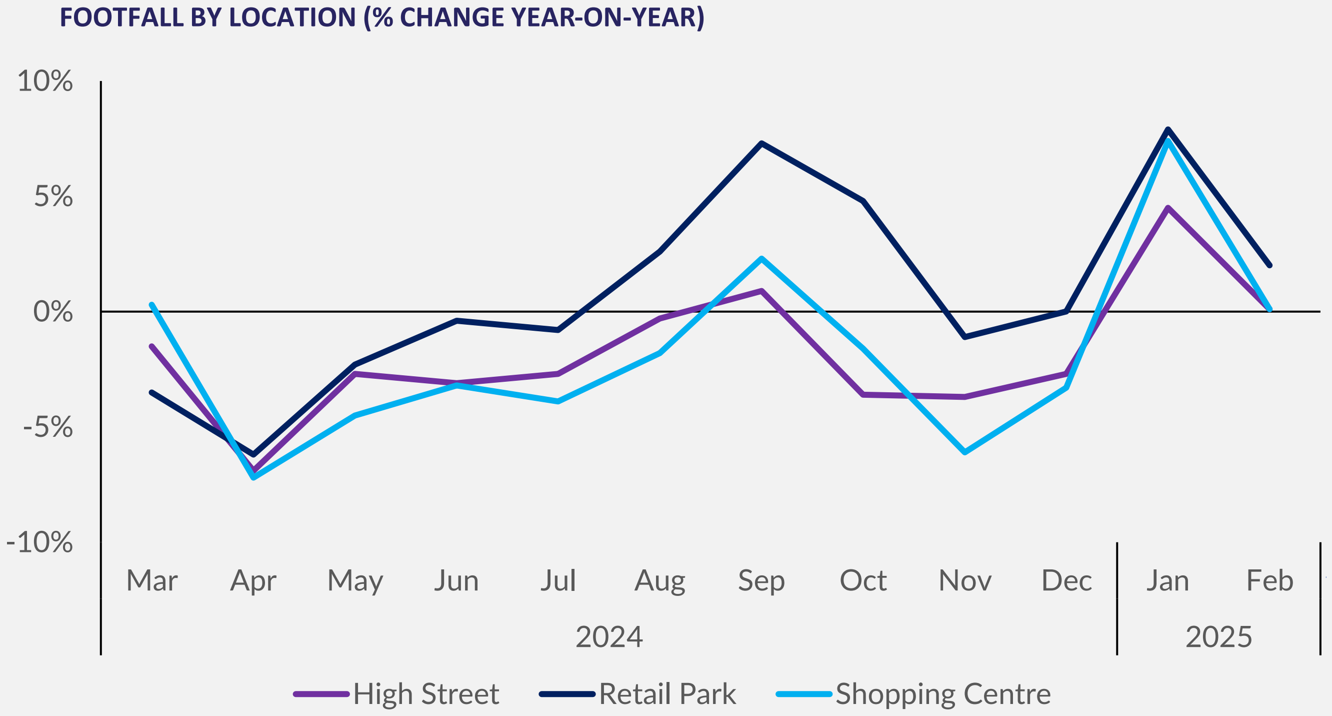
Week Two

down ↓15.3%

Year-on-Year

UK RETAIL FOOTFALL - BY LOCATION

BRC - Sensormatic Footfall Monitor



Modest YoY improvement in February, compared to previous month

Retail Park:

- 2.0% year-on-year footfall increase in Feb-25
- Suggesting stabilization after January's sharp rebound
- Despite some fluctuations, February's increase continues the overall recovery trend seen since mid-2024.

Shopping Centre:

- 0.1% year-on-year footfall increase in Feb-25.
- February's performance indicates that Shopping Centres are struggling to maintain consistent growth, unlike Retail Parks, which saw stronger gains.
- Despite fluctuations, the January surge and February's stability suggest Shopping Centres are regaining footfall, but at a slower pace

High Street:

- 0.1% year-on-year footfall increase in Feb-25.
- Indicating stabilisation but limited momentum
- February's near-flat growth suggests the High Street recovery remains fragile, with challenges in sustaining footfall gains

Retail Park
up ↑2.0%
Year-on-Year

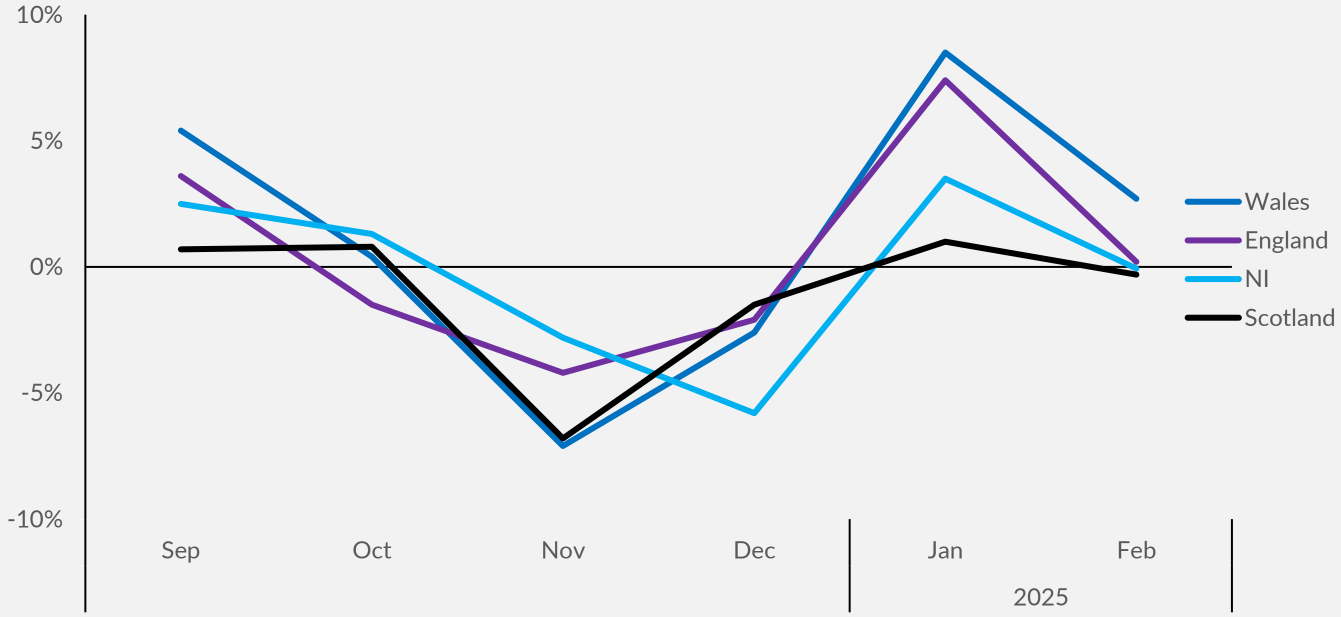
Shopping Centre
up ↑0.1%
Year-on-Year

High Street
up ↑0.1%
Year-on-Year

UK NATION RETAIL FOOTFALL - BY MONTH

BRC - Sensormatic Footfall Monitor

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



UK NATIONS

Footfall Country Rank (YoY)

Wales:
- **YoY:** footfall volume **improved↑**2.7%
- **MoM:** footfall recovery **fell↓**5.8pp
- Top of the Nation ranking table for the second consecutive month

England:
- **YoY**: footfall volume **improved↑**0.2%
- **MoM**: footfall recovery **fell↓**7.2pp
- In positive territory for the second consecutive month of 2025

Northern Ireland:
- **YoY**: footfall volume **fell↓**0.1%
- **MoM**: footfall recovery **fell↓**3.6pp
- Has shown more volatility in this period compared to other nations

Scotland:
- **YoY**: footfall volume **fell↓**0.3%
- **MoM**: footfall recovery **fell↓**1.3pp
- Bottom of the table for the second consecutive month

ENGLAND REGION FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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

	Jan-25	Feb-25	Jan-25 rank	Feb-25 rank	Rank Change
North West England	+7.7%	+1.9%	5	1	4
West Midlands	+10.0%	+1.8%	1	2	-1
London	+6.7%	+1.8%	7	2	5
South East England	+9.4%	+0.4%	2	4	-2
East of England	+8.5%	-0.8%	3	5	-2
North East England	+6.8%	-1.0%	6	6	0
East Midlands	+6.4%	-1.3%	8	7	1
South West England	+7.9%	-1.4%	4	8	-4
Yorkshire and the Humber	+3.3%	-3.5%	9	9	0

ENGLAND REGIONAL RANKINGS

Highest YoY: North West England

- YoY: footfall volume **improved** ↑1.9%
- MoM: footfall recovery **fell** ↓5.8pp
- Top of the table for the first time since 2022

Highest YoY

NW England

up ↑1.9%

Lowest YoY: Yorkshire and the Humber

- YoY: footfall volume **fell** ↓3.5%
- MoM: footfall recovery **fell**↓6.8pp
- Bottom of the table for the second consecutive month

Lowest YoY

Yorkshire & Humber

down ↓3.5%

UK CITY FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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

	Jan-25	Feb-25	Jan-25 rank	Feb-25 rank	Rank Change
Birmingham	+14.3%	+5.0%	1	1	→0
Manchester	+10.3%	+3.9%	2	2	→0
Edinburgh	+2.8%	+1.9%	9	3	↑6
London	+6.7%	+1.8%	4	4	→0
Belfast	+4.8%	+0.1%	7	5	↑2
Nottingham	+6.7%	-0.3%	4	6	↓-2
Glasgow	+1.9%	-1.1%	10	7	↑3
Cardiff	+9.1%	-1.8%	3	8	↓-5
Liverpool	+3.2%	-2.5%	8	9	↓-1
Bristol	+6.2%	-5.2%	6	10	↓-4
Leeds	+1.0%	-5.6%	11	11	→0

UK CITIES RANKINGS

Major Cities:

- Almost an equal number of cities experienced year-on-year declines and growth
- Feb-25 City Avg vs Feb-24 City Avg: footfall recovery **improved** ↑2.4pp
- Compared to Jan-25 City Avg: recovery **fell** ↓6.4pp
- Second highest avg since Sep-24
- Continues positive trend for 2025

Strongest:

Birmingham

- YoY: footfall volume **improved** ↑5.0%
- MoM: footfall recovery **fell** ↓9.3pp
- Third month in a row to top the table

Best Performing City

Birmingham

up ↑5.0%

Weakest:

Leeds

- YoY: footfall **fell** ↓5.6%
- MoM: footfall recovery **fell** ↓6.6pp
- Second consecutive month at the bottom of the table

Worst Performing City

Leeds

down ↓5.6%

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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