



**Sensormatic**  
by Johnson Controls



# FOOTFALL MONITOR

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

December 2025

Covering the five weeks 30 Nov 2025 - 03 Jan 2026



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# Headline Commentary



Helen Dickinson OBE  
Chief Executive | British Retail Consortium

*“It was a disappointing December for retailers as footfall declined across all shopping locations, as well as in the major cities. In the face of rising bills and food costs, many consumers held off for post-Christmas sales, with the week after Christmas the only one to see a significant uplift. Shoppers were also browsing less in the lead up to Christmas, making fewer, but more targeted shopping trips, particularly in Shopping Centres, which saw the largest drop in footfall.*

*“Last month’s figures capped a challenging year, with total shopper traffic down in 2025. This marks the third consecutive year of annual footfall decline, reflecting the continuing evolution in shopping habits and the retail landscape. Those shopping locations which have bucked the trend have done so by creating a complete offering, making themselves a destination for shopping, eating, drinking and leisure activities. To encourage a wider improvement in footfall it’s essential that Government fosters the economic environment needed for retailers to increase investment in their stores and their communities.”*

## Sensormatic by Johnson Controls

Andy Sumpter  
Retail Consultant | EMEA | Sensormatic

*“December marked the eighth consecutive month of declining footfall, with UK shopper traffic down -2.9% year-on-year, bringing the golden quarter to a muted -2.2%. High Streets proved most resilient at -0.9%, while Shopping Centres fell -5.1% and Retail Parks dipped -2.5%.*

*“Retail hasn’t necessarily got harder; it’s just become less forgiving - from shifting consumer demand to rising cost-bases across labour and business rate reform. This means retailers must break the cycle where cost-cutting impedes investment in the capabilities and services needed for sustainable growth.*

*“Yet, despite the challenges, there are still pockets of demand to be tapped. Shopper traffic rallied outside traditional peak days, showing festive buying patterns are changing. And while UK footfall fell year-on-year, it was the second strongest among G7 markets in December - a sign of resilience in a tough trading climate.”*



# Executive Summary

Retail footfall fell further in December compared to last year, declining more sharply than in November and ending the year on a subdued note. Visits dropped across all locations, with Shopping Centres hit hardest. High Streets fared better, buoyed by convenience trips and local events, while Retail Parks contracted after earlier gains. Persistent economic pressures, cautious consumer sentiment, and cost-of-living constraints outweighed seasonal promotions, leaving the Golden Quarter short of expected uplift and highlighting the limits of traditional peak trading strategies.

## Retail Footfall Index – December 2025

- vs Dec 2024: YoY Footfall Volume down ↓2.9%
- vs 3-mth average 2024: YoY Footfall Volume down ↓2.2%
- vs Nov 2025: MoM Footfall Recovery down ↓2.1pp

↓2.9%

% change YoY

## Footfall By Shopping Location:

### High Street

- vs Dec 2024: YoY Footfall Volume down ↓0.9%
- vs Nov 2025: MoM Footfall Recovery improved ↑0.3pp

↓0.9%

% change YoY

### Retail Park

- vs Dec 2024: YoY Footfall Volume down ↓2.5%
- vs Nov 2025: MoM Footfall Recovery down ↓2.1pp

↓2.5%

% change YoY

### Shopping Centre

- vs Dec 2024: YoY Footfall Volume down ↓5.1%
- vs Nov 2025: MoM Footfall Recovery down ↓3.8pp

↓5.1%

% change YoY

pp = percentage points



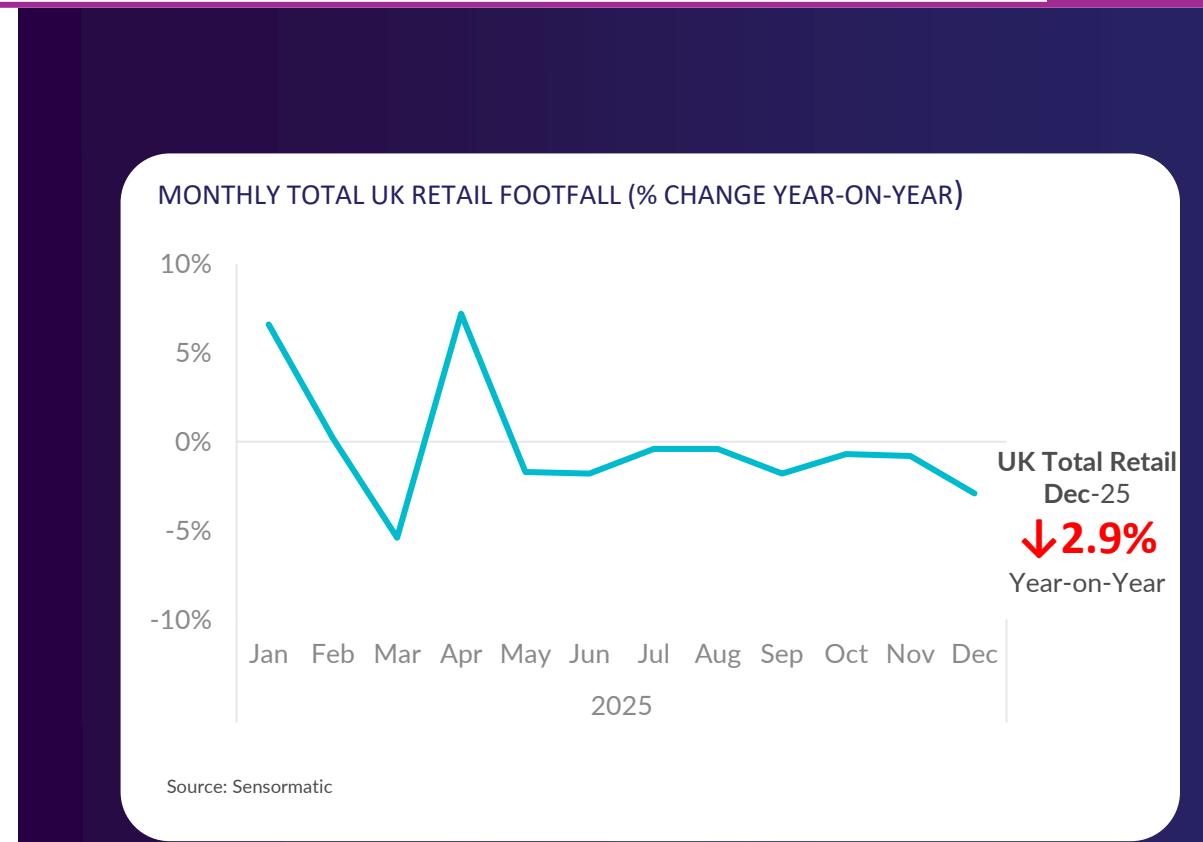
## UK Total Retail (Month)

### December 2025

- December recorded the weakest performance of the Golden Quarter in terms of year-on-year footfall.
- The usual festive uplift in store visits was significantly muted.
- Consumers appeared more deliberate, making fewer but more purposeful shopping trips.
- A continued shift towards online purchasing for gifts, groceries, and last-minute items reduced reliance on physical stores.
- Cost-of-living pressures likely constrained discretionary travel and impulse visits during the festive period.
- Shorter shopping missions and increased use of delivery and click-and-collect may have limited time spent in retail destinations.

### Golden Quarter 2025 (Oct-Dec)

- Footfall across the Golden Quarter underperformed compared with the same period last year.
- The typical seasonal acceleration in store visits was weaker and less sustained.
- Consumer behaviour suggests a shift towards fewer, more intentional shopping trips, rather than regular browsing.
- Promotional activity increasingly influenced when consumers shopped, but not how often they visited stores.
- Online and omnichannel options continued to capture a growing share of peak-season demand.
- The quarter highlights structural challenges for physical retail, even during peak trading.



## UK Total Retail (Dec-25: Weeks 1-5)

### Week 1: ↑0.8% (YoY)

- The month started with a modest increase, suggesting a strong early December shopping period, likely driven by early holiday shoppers and pre-Christmas promotions.

### Week 2: ↓5.8% (YoY)

- Footfall dropped noticeably in the second week, indicating that early demand had tapered off.
- Shoppers may have been delaying purchases, possibly waiting for mid-December deals or promotions.

### Week 3: ↓9.0% (YoY) [WEAKEST WEEK]

- This week saw the steepest decline of the month, suggesting a mid-December lull.
- This could reflect a slowdown as shoppers shift to online channels or postpone visits until the final pre-Christmas rush.

### Week 4: ↓7.1% (YoY)

- Footfall remained lower than last year but improved slightly from the previous week, reflecting the start of the last-minute Christmas shopping period, though still subdued.

### Week 5: ↑7.7% (YoY) [STRONGEST WEEK]

- The month ended with a significant rebound, likely reflecting post-Christmas shopping and Boxing Day sales, which historically drive a surge in in-store visits.

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



Source: Sensormatic

## UK Shopping Locations

### High Street ↓0.9% (YoY)

- **December:** Footfall softened slightly, indicating weaker festive trading.
- **Golden Quarter:** Relatively stable but muted growth across the period, showing limited holiday uplift.
- **Trend insight:** High Streets showed more resilience earlier in the year but struggled to convert seasonal opportunities into strong footfall gains.

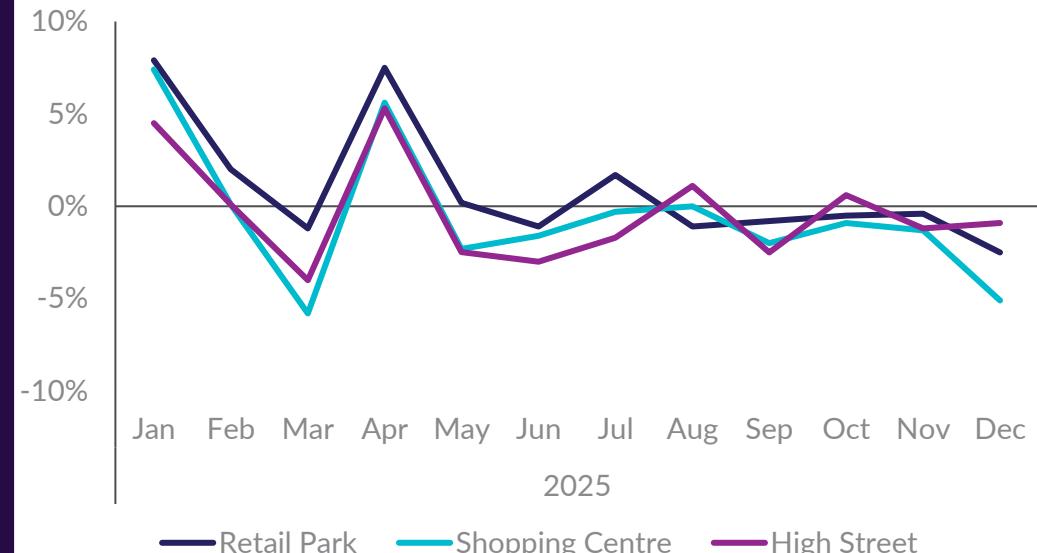
### Retail Park ↓2.5% (YoY)

- **December:** Experienced a noticeable decline, suggesting shoppers may have favoured alternative channels or formats.
- **Golden Quarter:** Performance under pressure, with small declines overall, pointing to weaker seasonal demand.
- **Trend insight:** Retail Parks maintained steadier performance than other formats for most of the year, but December weakness highlights limits to this resilience.

### Shopping Centre ↓5.1% (YoY)

- **December:** Significant downturn, indicating a tough festive period and potential reduced dwell time or shopper preference shift.
- **Golden Quarter:** Footfall broadly negative, highlighting ongoing challenges in attracting shoppers during peak season.
- **Trend insight:** Shopping Centres consistently underperformed across the year, with the golden quarter amplifying the difficulties in drawing shoppers.

UK FOOTFALL BY LOCATION (% CHANGE YOY)



Source: Sensormatic

## UK Nations

### Scotland: ↓1.5% (YoY)

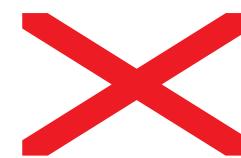
- December footfall softens slightly, continuing a trend of modest declines in the latter part of the year.
- Golden Quarter performance is muted, indicating cautious consumer activity during the key trading period.

### Rank (YoY)



### N Ireland: ↓1.7% (YoY)

- December sees a slight decline, following a mixed year.
- Golden Quarter is relatively steady, supported by a moderate uplift in November, but not enough to offset earlier dips.



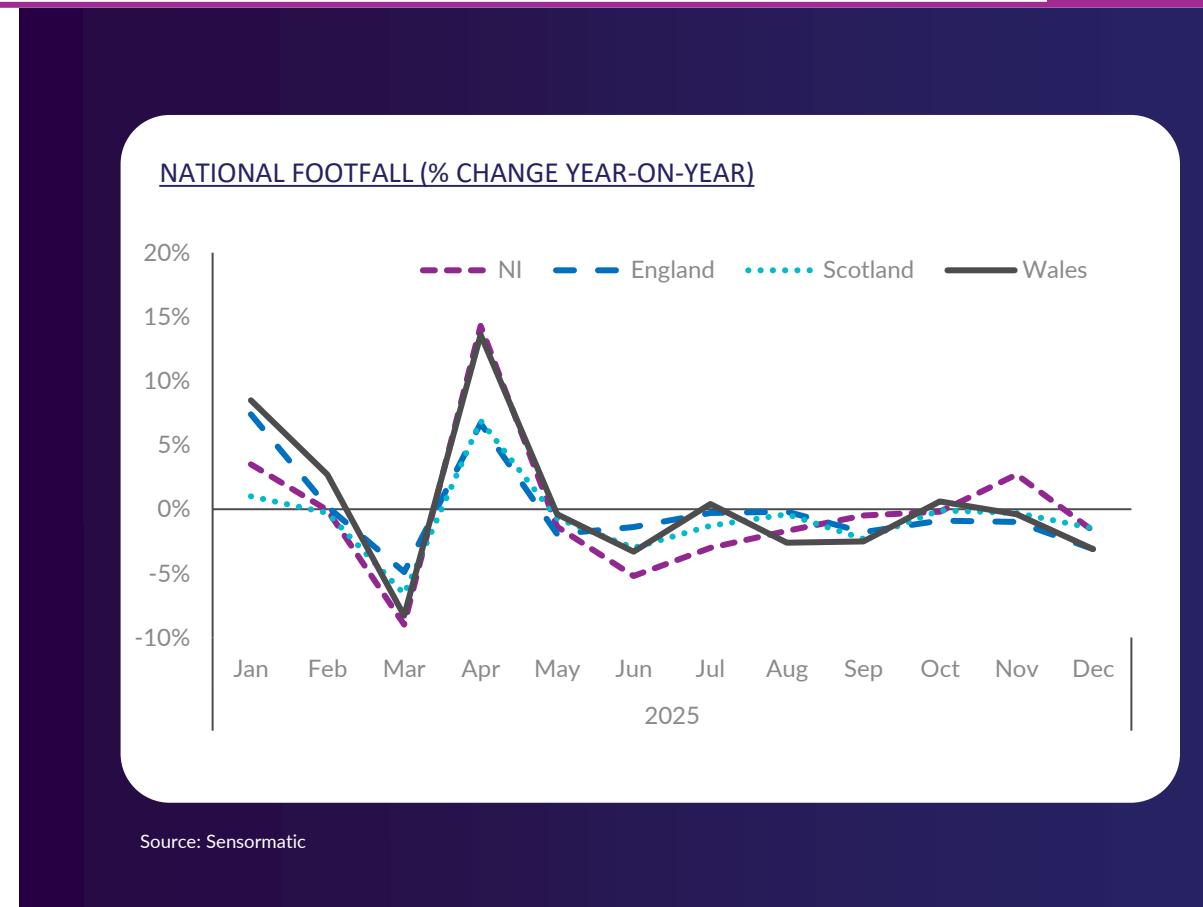
### Wales: ↓3.1% (YoY)

- December records a noticeable slowdown, contrasting with stronger mid-year periods.
- Golden Quarter remains soft, reflecting weaker seasonal shopping momentum.



### England: ↓3.1% (YoY)

- December shows a clear decline, marking the end of the year on a softer note.
- Golden Quarter performance is subdued, reflecting weaker festive footfall compared with earlier months.



## UK City Rankings

### Best Performing: London ↓0.4% (YoY)

- Top of table despite a year-on-year dip, signaling strong relative resilience.
- Moved up from mid-table in November to the top spot, suggesting effective late-season trading and event pull.
- Tourism, flagship destinations, and transport connectivity likely underpinned weekend and evening visits.
- Aggressive promotions and extended opening hours appear to have converted browsing into visits, even in poor weather.

### Worst Performing: Birmingham ↓8.1% (YoY)

- At the bottom of the table again, reflecting ongoing challenges compared with other major city centres.
- Seasonal attractions and discounting were insufficient to lift city-centre visits materially.
- Retail mix skewed toward discretionary categories may have amplified sensitivity to cost-of-living pressures.
- Ongoing city-centre works, transport frictions, or parking constraints may have suppressed convenience-led trips.

	Nov-25	Dec-25	Nov-25 rank	Dec-25 rank	Rank Change
London	+0.8%	-0.4%	4	1	▲ 3
Edinburgh	0.0%	-0.5%	6	2	▲ 4
Manchester	+0.5%	-0.8%	5	3	▲ 2
Glasgow	-1.6%	-1.2%	7	4	▲ 3
Bristol	+2.1%	-1.7%	1	5	▼ -4
Belfast	+1.1%	-2.8%	3	6	▼ -3
Sheffield	+2.0%	-3.1%	2	7	▼ -5
Cardiff	-3.2%	-4.4%	8	8	➡ 0
Liverpool	-7.0%	-4.5%	10	9	▲ 1
Leeds	-4.6%	-6.3%	9	10	▼ -1
Birmingham	-10.0%	-8.1%	11	11	➡ 0

Source: Sensormatic

## England Regional Rankings

### Highest YoY: London ↓0.4% (YoY)

- Outperformed other regions, pointing to stronger late-season draw across central destinations and transport-linked hubs.
- Improved versus November, suggesting effective execution of festive programming and retail promotions.
- Tourism, office worker return, and major venue events likely lifted evening and weekend visits.
- High-street anchors and experiential offers appear to have offset broader consumer caution.

### Lowest YoY: West Midlands ↓5.5% (YoY)

- Bottom of the table, indicating ongoing structural pressures in key city centres.
- Seasonal activity and discounting did not materially shift visit patterns compared with November.
- Retail mix leaning to discretionary categories and dependence on a few large destinations may be amplifying sensitivity to household budgets.
- Regional economic pressures, including slower wage growth and higher transport costs, likely amplified footfall declines

	Nov-25	Dec-25	Nov-25 rank	Dec-25 rank	Rank Change
London	+0.8%	-0.4%	2	1	⬆ 1
North West England	-1.3%	-2.3%	4	2	⬆ 2
South West England	+1.3%	-2.9%	1	3	⬇ -2
East Midlands	-2.6%	-3.3%	7	4	⬆ 3
South East England	-0.2%	-4.4%	3	5	⬇ -2
Yorkshire and the Humber	-2.1%	-4.5%	5	6	⬇ -1
East of England	-2.3%	-4.5%	6	6	➡ 0
North East England	-5.0%	-5.0%	9	8	⬆ 1
West Midlands	-3.2%	-5.5%	8	9	⬇ -1

Source: Sensormatic

# Methodology

## The BRC & Sensormatic

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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