Comprehensive measure of store customer traffic

Benchmark by UK nations, location type and major cities

BRC-SENSORMATIC FOOTFALL MONITOR

January 2025

Period covered:
29 December 2024 – 01 February 2025

Headline commentary

Helen Dickinson OBE | Chief Executive | British Retail Consortium

"Shopper footfall received a welcome boost in January following a disappointing festive period. Store visits increased substantially in the first week of the month as many consumers hit the January sales in their local community, with shopping centres faring particularly well. Despite snowy weather and Storm Eowyn causing disruption in some areas, footfall was still positive across major UK cities over the whole month.

"Improved shopper traffic is welcome news for high streets following a particularly difficult 'Golden Quarter' to end 2024, and low consumer sentiment to start the year. Retailers want to invest more in stores and staff to enhance the shopping experience for customers and help to grow the economy, but the swathe of additional costs from April will limit investment and lead to job losses and higher prices at the tills. To drive growth in communities across the country, the government must ensure costs are limited in other areas. This can be done by delaying packaging taxes and ensuring that business rates reform leaves no shop paying more than they currently do."

Andy Sumpter | Retail Consultant – EMEA | Sensormatic

"After a dreary December, retailers will welcome January's footfall jump. The uptick was boosted by a very strong Week 1, helped in part by New Year's Day falling on a Wednesday, which may have prompted ambient store traffic as consumers bolted on additional days of leave, as well as retailers extending post-Christmas discounting well into January. Not even the significant disruption from Storm Eowyn was enough to dampen overall footfall performance. While welcome, after months of erratic and constrained footfall, the jury's out as to whether January's store performance signals the start of a sustained High Street revival or if it will be a flash in the pan come February. And, even if shopper traffic recovery has finally turned a corner, the challenge for retailers will be solving the next conundrum; how they balance enhanced footfall – which requires optimised store staffing to convert into sales – and the significant rises to labour costs borne out of the Budget on the one hand, with consumer appetite for discounts - a long-term margin-eroder - on the other, which will not be an easy circle to square."

Executive Summary

In January 2025, UK retail footfall saw a notable rebound with a 6.6% year-on-year increase, marking a significant turnaround from the preceding months of decline. This surge reflects savvy shoppers looking for bargains. The strong start to the year helps retailers who had a difficult 2024.

Retail Footfall Index – January 2025

- Footfall volume compared to Jan-24:
  - Improved ↑6.6%
- Footfall recovery compared to prior month, Dec-24:
  - Improved ↑8.8 pp
- Footfall volume 3-mth average (Nov-24 to Jan-25)
  - Fell ↓0.3%

up 6.6%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

Retail Park

- Footfall volume (YoY):
  - vs Jan-24: Improved ↑7.9%
- Footfall recovery (MoM):
  - vs Dec-24: Improved ↑7.9pp

up 7.9%
% change YoY

Shopping Centre

- Footfall volume (YoY)
  - vs Jan-24: Improved ↑7.4%
- Footfall recovery (MoM):
  - vs Dec-24: Improved ↑10.7pp

up 7.4%
% change YoY

High Street

- Footfall volume (YoY):
  - vs Jan-24: Improved ↑4.5%
- Footfall recovery (MoM):
  - vs Dec-24: Improved ↑7.2pp

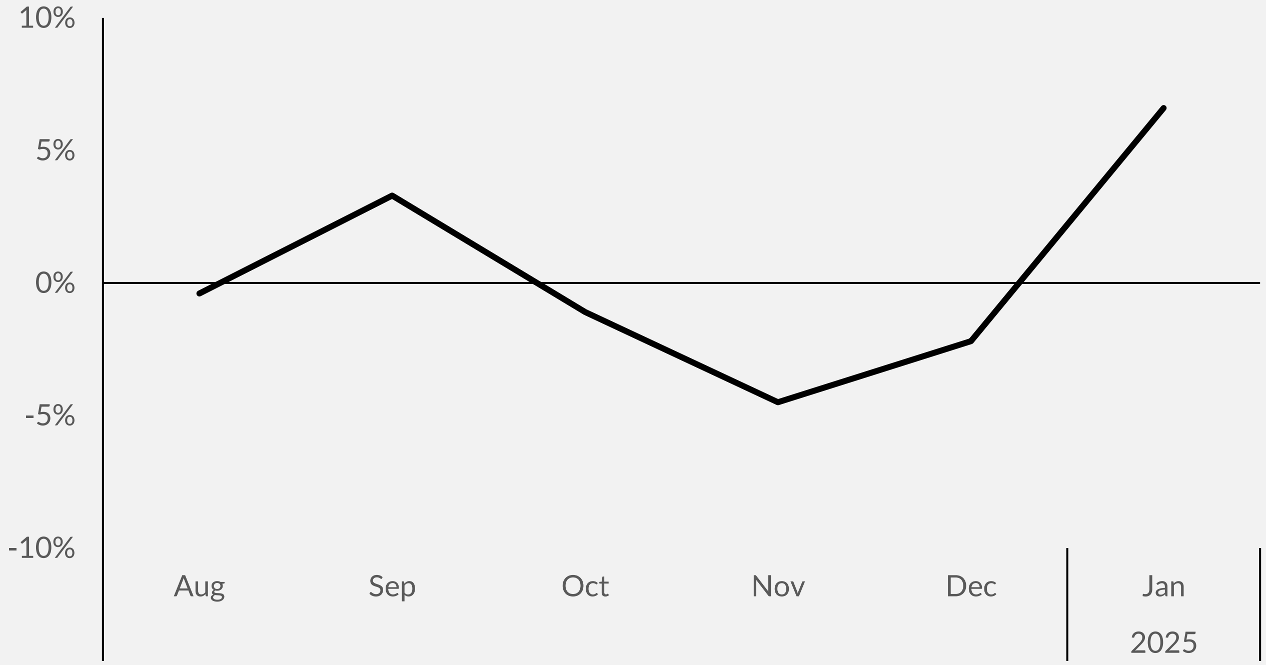
up 4.5%
% change YoY

pp = percentage points

UK RETAIL FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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



UK Retail Footfall Surges in Jan-25

- In Jan-25, there was a significant increase in retail footfall volume, with a YoY growth of 6.6%.
- This increase marks a turnaround from the previous year (Jan-24), where there was a decrease of 2.8% in total footfall.
- In addition, there was a sharp increase of 8.8 percentage points from Dec-24 to Jan-25.
- In Jan-25, retail footfall showed a marked improvement, providing a much-needed boost for retailers after a challenging 2024.
- The 6.6% rise in UK retail footfall in Jan-25 is likely due to a combination of comparatively weak Jan-24 and aggressive sales promotions.

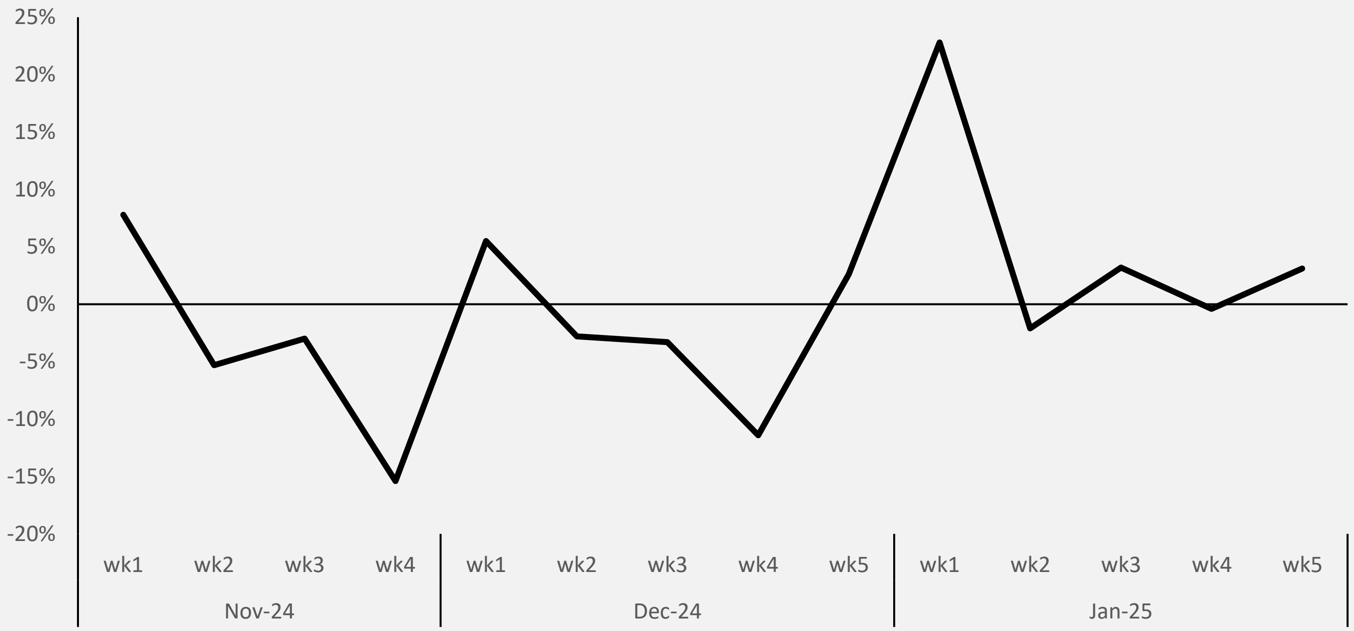
UK Total Retail
Jan-25
up ↑**6.6%**
Year-on-Year

Nov-24 to Jan-25
[3-month average]
down ↓**0.3%**
Year-on-Year

UK RETAIL FOOTFALL – BY WEEK

BRC - Sensormatic Footfall Monitor

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



First, third and last week of Jan-25 were in positive YoY territory

Week 1 YoY: improved ↑22.8%
- Gained an advantage from starting 2 days earlier than the corresponding week last year, particularly during the peak shopping days between Christmas and New Year..

Week 2 YoY: fell ↓2.1%
- Footfall declined in this week mainly due to heavy rain and snow across the country.

Week 3 YoY: improved ↑3.2%
- Footfall rebounded moderately, driven by promotions, and a lack of disruptions

Week 4 YoY: fell ↓0.4%
- Storm Éowyn deterred shoppers, and cultural celebrations like Burns Night failed to offset the weather-driven decline

Week 5 YoY: improved ↑3.1%
- Footfall rose at month's end, driven by the Chinese New Year and end-of-month shopping

JAN-25 TOP WEEK

Week One

up ↑22.8%

Year-on-Year

JAN-25 BOTTOM WEEK

Week Two

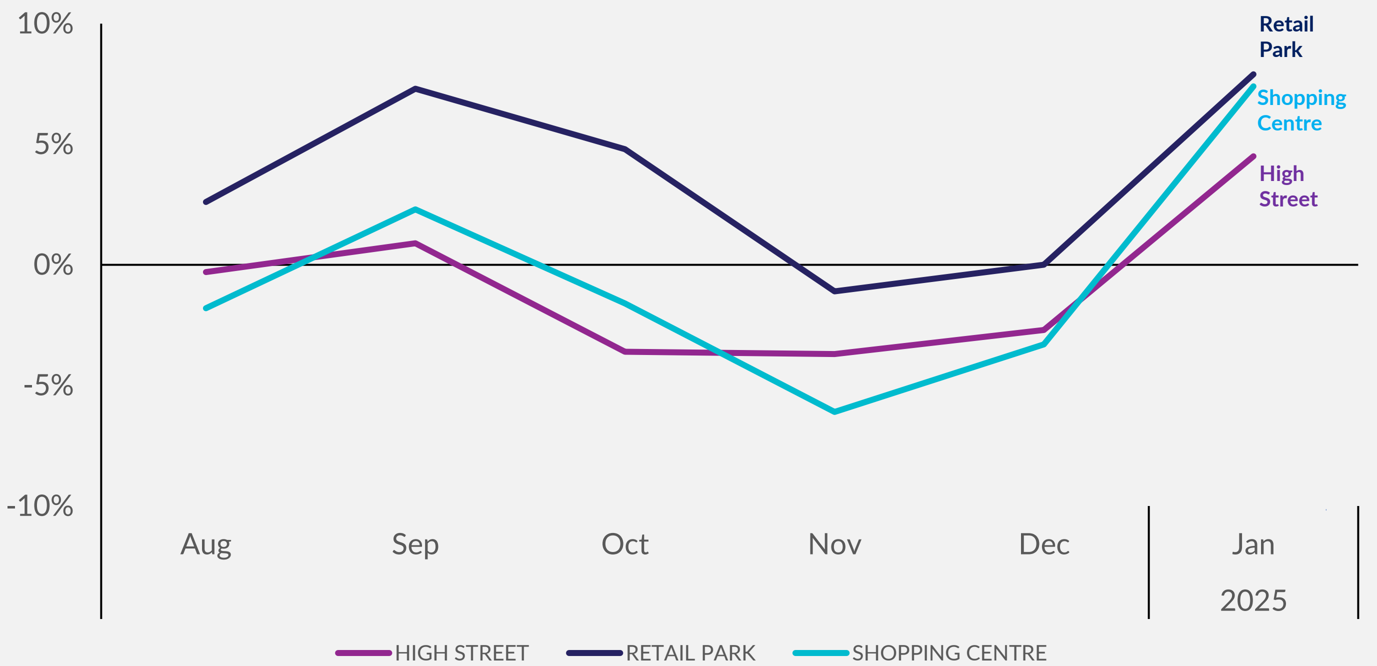
down ↓2.1%

Year-on-Year

UK RETAIL FOOTFALL - BY LOCATION

BRC - Sensormatic Footfall Monitor

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



All 3 locations move into positive territory in Jan-25

Retail Park:
- +7.9% year-on-year footfall increase in Jan-25.
- Consistent growth reflecting retail parks' appeal for convenience and accessibility.
- Consumer preference likely boosted by outdoor spaces and ample parking.

Retail Park
up ↑7.9%
Year-on-Year

Shopping Centre:
- +7.4% year-on-year footfall increase in Jan-25.
- Strong recovery after several months of decline.
- Likely driven by winter sales and indoor shopping comfort, appealing to consumers.

Shopping Centre
up ↑7.4%
Year-on-Year

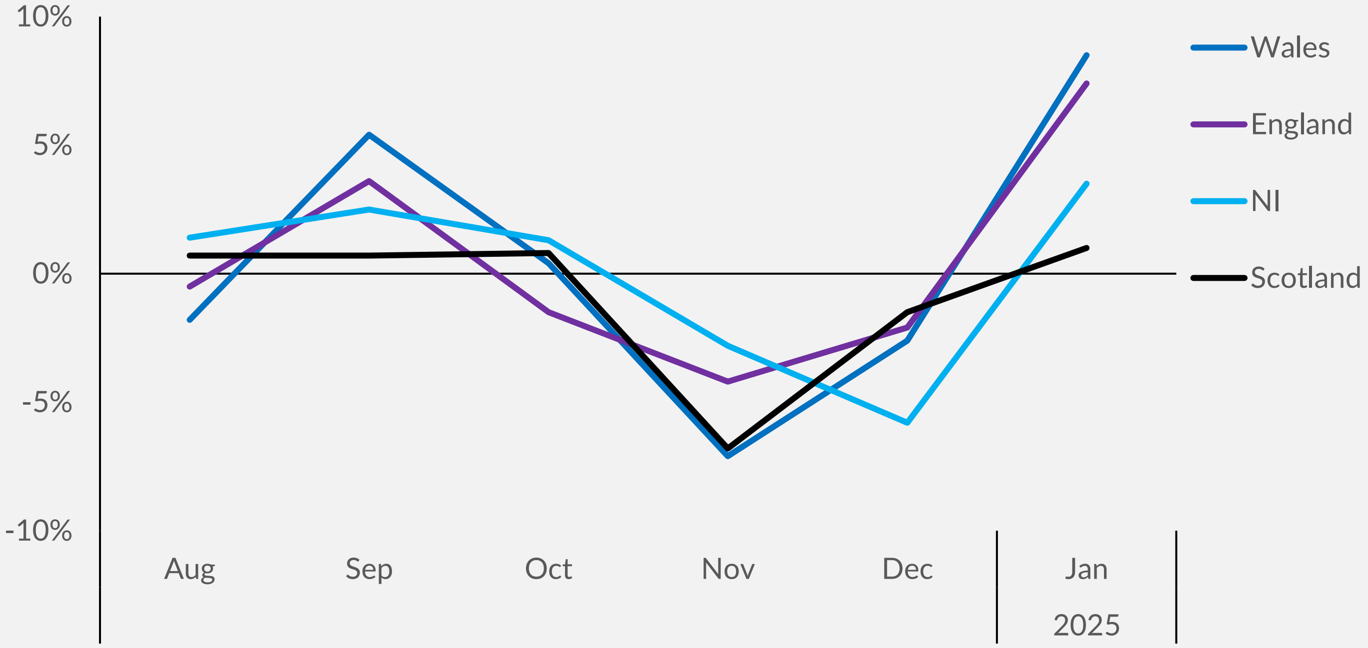
High Street:
- +4.5% year-on-year footfall increase in Jan-25.
- Significant recovery after fluctuating/negative trends in prior months.
- Likely driven by seasonal factors (post-holiday sales, promotions).

High Street
up ↑4.5%
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:

- Jan-25 vs Jan-24: footfall volume improved ↑8.5%
- Jan-25 vs Dec-24: footfall recovery improved ↑11.1pp
- Compared to other nations, strongest YoY recovery and strongest recovery compared to previous mth

England:

- Jan-25 vs Jan-24: footfall volume improved ↑7.4%
- Jan-25 vs Dec-24: footfall recovery improved ↑9.5pp
- Strongest YoY recovery since Feb-23

Northern Ireland:

- Jan-25 vs Jan-24: footfall volume improved ↑3.5%
- Jan-25 vs Dec-24: footfall recovery improved ↑9.3pp
- Strongest YoY recovery since Mar-24

Scotland:

- Jan-25 vs Jan-24: footfall volume improved ↑1.0%
- Jan-25 vs Dec-24: footfall recovery improved ↑2.5pp
- Strongest YoY recovery since Jul-23

ENGLAND REGION FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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

	Dec-24	Jan-25	Dec-24 rank	Jan-25 rank	Rank Change
West Midlands	-1.1%	+10.0%	1	1	→ 0
South East England	-1.1%	+9.4%	1	2	↓ -1
East of England	-3.4%	+8.5%	8	3	↑ 5
South West England	-4.8%	+7.9%	9	4	↑ 5
North West England	-1.4%	+7.7%	4	5	↓ -1
North East England	-3.3%	+6.8%	7	6	↑ 1
London	-1.2%	+6.7%	3	7	↓ -4
East Midlands	-2.7%	+6.4%	5	8	↓ -3
Yorkshire and the Humber	-2.9%	+3.3%	6	9	↓ -3

ENGLISH REGIONAL RANKINGS

Highest YoY: West Midlands

- Jan-25 vs Jan-24: footfall volume improved ↑10.0%
- Jan-25 vs Dec-24:footfall recovery improved ↑11.1pp
- Top of the table for 3 out of the last 4 months

Highest YoY

West Midlands

up ↑10.0%

Lowest YoY: Yorkshire and the Humber

- Jan-25 vs Jan-24: footfall volume improved ↑3.3%
- Jan-25 vs Dec-24: **footfall recovery** improved ↑6.2pp
- Bottom of the table for 3 out of the last 6 months

Lowest YoY

Yorkshire & Humber

up ↑3.3%

UK CITY FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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

	Dec-24	Jan-25	Dec-24 rank	Jan-25 rank	Rank Change
Birmingham	+4.8%	+14.3%	1	1	0
Manchester	-3.0%	+10.3%	6	2	4
Cardiff	-3.5%	+9.1%	8	3	5
London	-1.2%	+6.7%	4	4	0
Nottingham	-3.3%	+6.7%	7	4	3
Bristol	-7.5%	+6.2%	11	6	5
Belfast	-7.2%	+4.8%	10	7	3
Liverpool	-3.8%	+3.2%	9	8	1
Edinburgh	-1.1%	+2.8%	3	9	-6
Glasgow	+0.2%	+1.9%	2	10	-8
Leeds	-3.0%	+1.0%	5	11	-6

UK CITIES RANKINGS

Major Cities:

- All cities in positive YoY territory
- Jan-25 City Avg vs Jan-24 City Avg: footfall recovery improved ↑8.5pp
- Compared to Dec-24 City Avg: recovery improved ↑8.7pp
- Highest avg since Feb-23
- First avg in positive territory since Sep-24

Strongest:

Birmingham

- Jan-25 vs Jan-24: footfall volume improved ↑14.3%
- Jan-25 vs Dec-24: footfall recovery improved ↑9.5pp
- Second month in a row to top the table

Best Performing City
Birmingham
up ↑14.3%

Weakest:

Leeds

- Jan-25 vs Jan-24: footfall improved ↑1.0%
- Jan-25 vs Dec-24: footfall recovery improved ↑4.0pp
- Second time at the bottom of the table in the last 3 months

Worst Performing City
Leeds
Up ↑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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Executive Summary

In December 2024, UK retail footfall showed a smaller year-on-year decline compared to November, suggesting a slightly better performance during the festive season. However, the trend for the year remained mixed. The year began with significant declines in January and February, which deepened in April. A gradual improvement emerged over the summer, with August nearly flat and September standing out as the strongest month of the year with positive growth. However, this recovery was short-lived, as declines returned in October and continued through November and December.

Retail Footfall Index – December 2024

- Footfall volume compared to Dec 2023:
  - Fell ↓2.2%
- Footfall recovery compared to prior month, Nov 2024:
  - Improved ↑2.3 pp
- Footfall volume 3-mth average (Golden Quarter 2024: Oct-Dec)
  - Fell ↓2.5% compared to Golden Quarter 2023

down 2.2%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

Retail Park

- Footfall volume compared to Dec 2023:
  - Remained consistent
- Footfall recovery compared to prior month, Nov 2024:
  - Improved ↑**1.1**pp

unchanged 0.0%
% change YoY

High Street

- Footfall volume compared to Dec 2023:
  - Fell ↓2.7%
- Footfall recovery compared to prior month, Nov 2024:
  - Improved ↑**1.0**pp

down 2.7%
% change YoY

Shopping Centre

- Footfall volume compared to Dec 2023:
  - Fell ↓3.3%
- Footfall recovery compared to prior month, Nov 2024:
  - Improved ↑**2.8pp**

down 3.3%
% change YoY

pp = percentage points

Executive Summary

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up 6.6%
% change YoY

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up 4.5%
% change YoY

Shopping Centre

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up 7.4%
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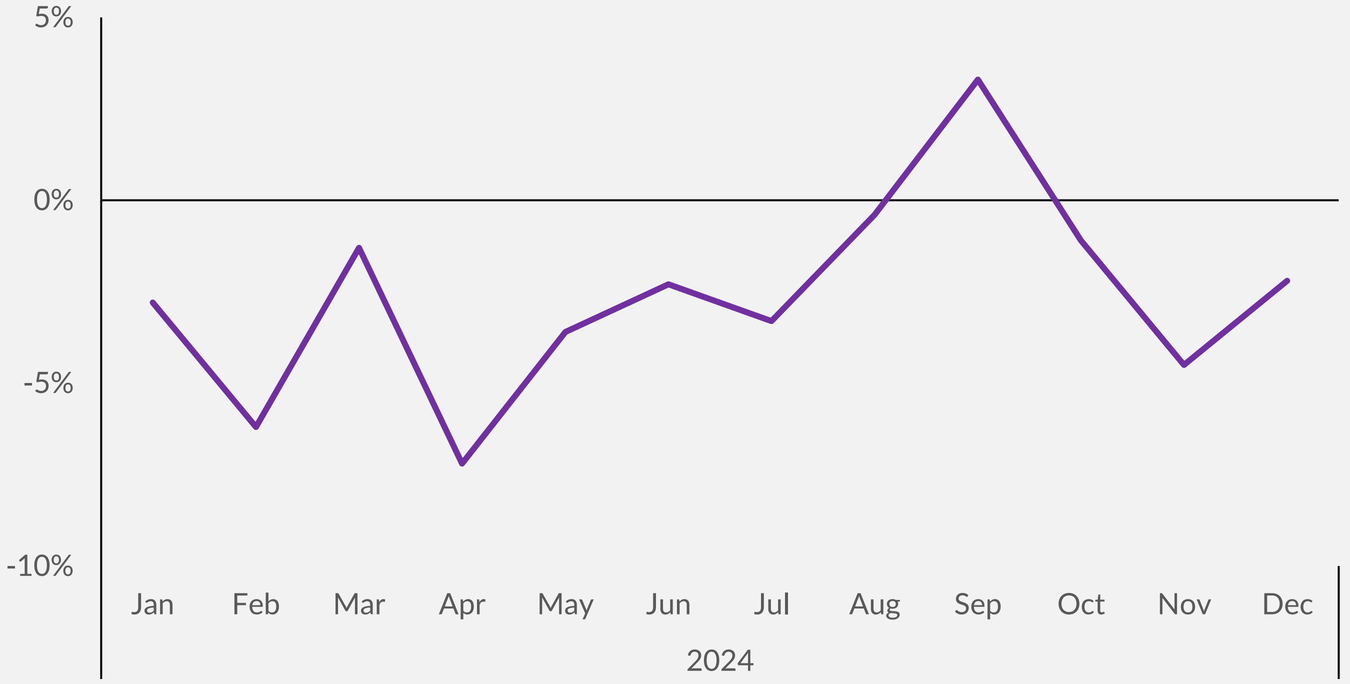
UK RETAIL FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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



December's YoY footfall remains in negative territory

- **Dec-24 vs Dec-23: footfall volume fell ↓2.2%**
- Dec-24 vs Nov-24: **footfall recovery improved ↑2.3pp**
- Key factors influencing footfall performance include:
    - In the months leading up to December, there were several negative changes, but the figure for December is not the lowest of the year (April had the largest decline). It does, however, suggest that retail footfall was still under pressure, even in a typically busy month.
    - Seasonality: December is typically a month of increased footfall due to Christmas shopping, but the decrease suggests that this year, the retail environment may have faced some challenges, such as economic factors, inflation, or shifting consumer behaviours (e.g., preference for online shopping over in-store visits).
- December's 2.2% decrease in footfall indicates that retail stores in the UK faced a modest decline in visits compared to the same month in 2023, likely due to broader challenges in the retail environment, despite the usual seasonal uptick in foot traffic.

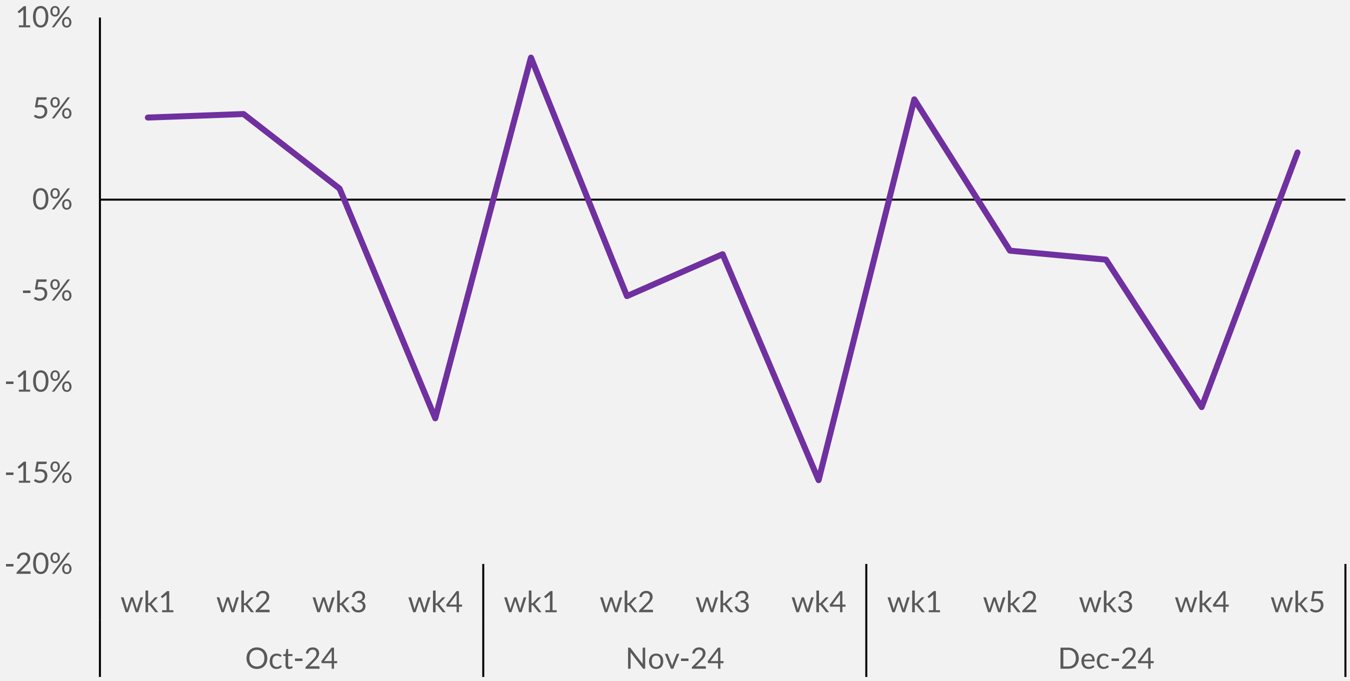
UK Total Retail
Dec-24
down ↓2.2%
Year-on-Year

(GOLDEN QUARTER 2024)
Oct - Dec
[3-month average]
down ↓2.5%
Year-on-Year

UK RETAIL FOOTFALL – BY WEEK

BRC - Sensormatic Footfall Monitor

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



First and last week in Dec-24 were in positive YoY territory

Week 1 YoY: improved ↑5.5%
- In 2024, Black Friday occurred during Week 1 of Dec, whereas in 2023, it took place in Week 4 of Nov

Week 2 YoY: fell ↓2.8%
- Drop in footfall likely due to early holiday shoppers completing purchases and a shift to online shopping

Week 3 YoY: fell ↓3.3%
- Further decline potentially due to the peak shopping period passing and external factors like weather or inflation deterring in-store visits

Week 4 YoY: fell ↓11.4%
- This is the largest drop in footfall for the month
- It could indicate that many consumers opted for online shopping as we got closer to Christmas

Week 5 YoY: improved ↑2.6%
- The YoY improvement reflects last-minute holiday shopping, with consumers seeking gifts and deals, possibly driven by discounts and clearance sales

DEC-24 TOP WEEK

Week One

up ↑5.5%

Year-on-Year

DEC-24 BOTTOM WEEK

Week Four

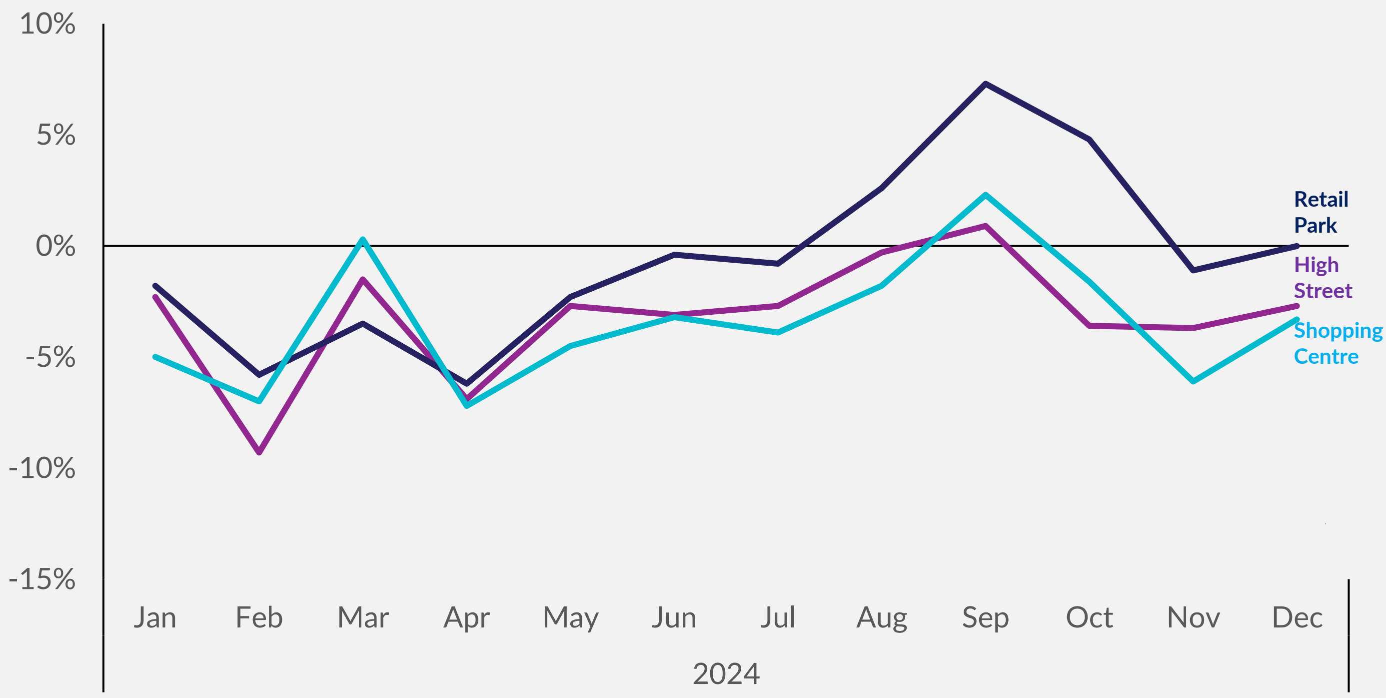
down ↓11.4%

Year-on-Year

UK RETAIL FOOTFALL - BY LOCATION

BRC - Sensormatic Footfall Monitor

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



Recovery improved for all 3 locations compared to prior month

Retail Park:
- **Dec-24** vs **Dec-23: footfall volume consistent**
- Dec-24 vs Dec-24: **footfall recovery improved ↑1.1pp**

High Street:
- **Dec-24** vs **Dec-23: footfall volume fell ↓2.7%**
- Dec-24 vs Dec-24: **footfall recovery improved ↑1.0pp**

Shopping Centre:
- **Dec-24** vs **Dec-23: footfall volume fell ↓3.3%**
- Dec-24 vs Dec-24: **footfall recovery improved ↑2.8pp**

Footfall over 2024:

- **Retail Park:** A fluctuating trend, with some months showing growth and others seeing declines. Closed the year with no change in footfall.
- **High Street**: Primarily a downward trend, with a significant drop early in the year. Finished the year with a moderate decrease in footfall.
- **Shopping Centre:** Largely negative, but with occasional positive months. Ended the year with a decline in footfall.

Retail Park
unchanged 0.0%
Year-on-Year

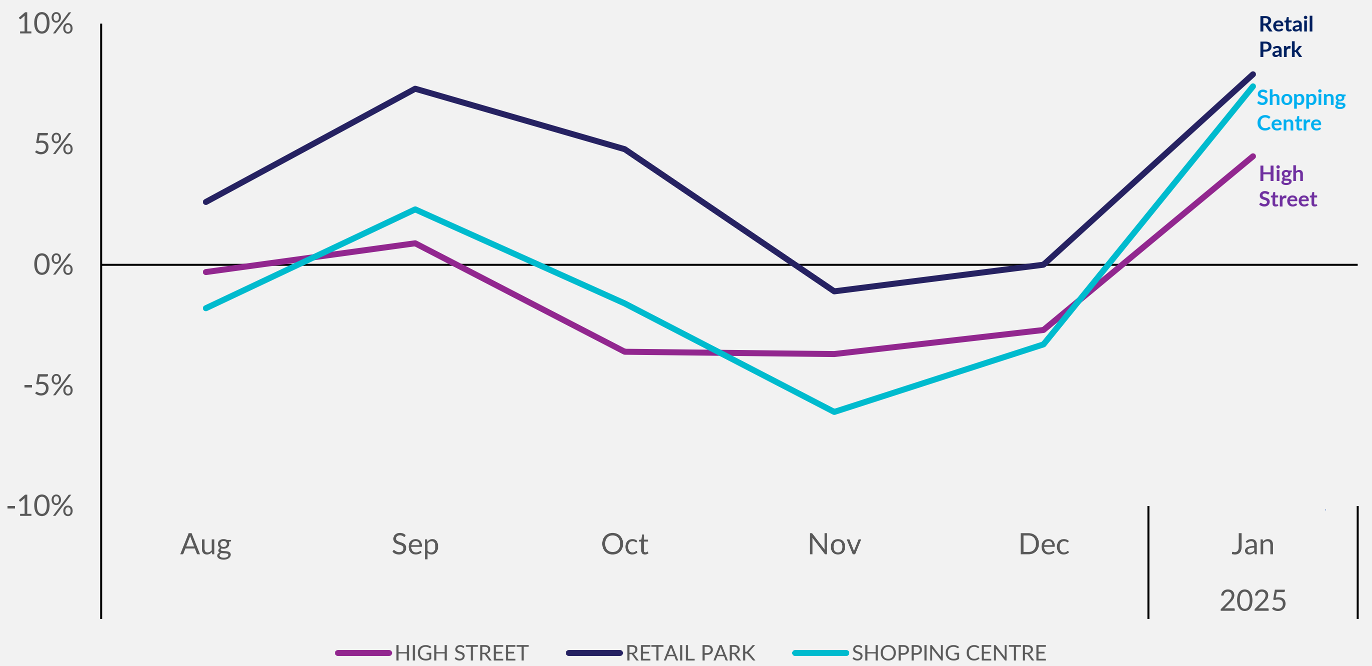
High Street
down ↓2.7%
Year-on-Year

Shopping Centre
down ↓3.3%
Year-on-Year

UK RETAIL FOOTFALL - BY LOCATION

BRC - Sensormatic Footfall Monitor

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



All 3 locations move into positive territory in Jan-25

Retail Park:
- **Jan-25 vs Jan-24**: footfall volume **improved ↑7.9%**
- **Jan-25 vs Dec-24**: footfall recovery **improved ↑7.9pp**

Shopping Centre:
- **Jan-25 vs Jan-24**: footfall volume **improved ↑7.4%**
- **Jan-25 vs Dec-24:** footfall recovery **improved ↑10.7pp**

High Street:
- **Jan-25 vs Jan-24**: footfall volume **improved ↑4.5%**
- **Jan-25 vs Dec-24:** footfall recovery **improved ↑7.2pp**

Retail Park
up ↑7.9%
Year-on-Year

Shopping Centre
up ↑7.4%
Year-on-Year

High Street
up ↑4.5%
Year-on-Year

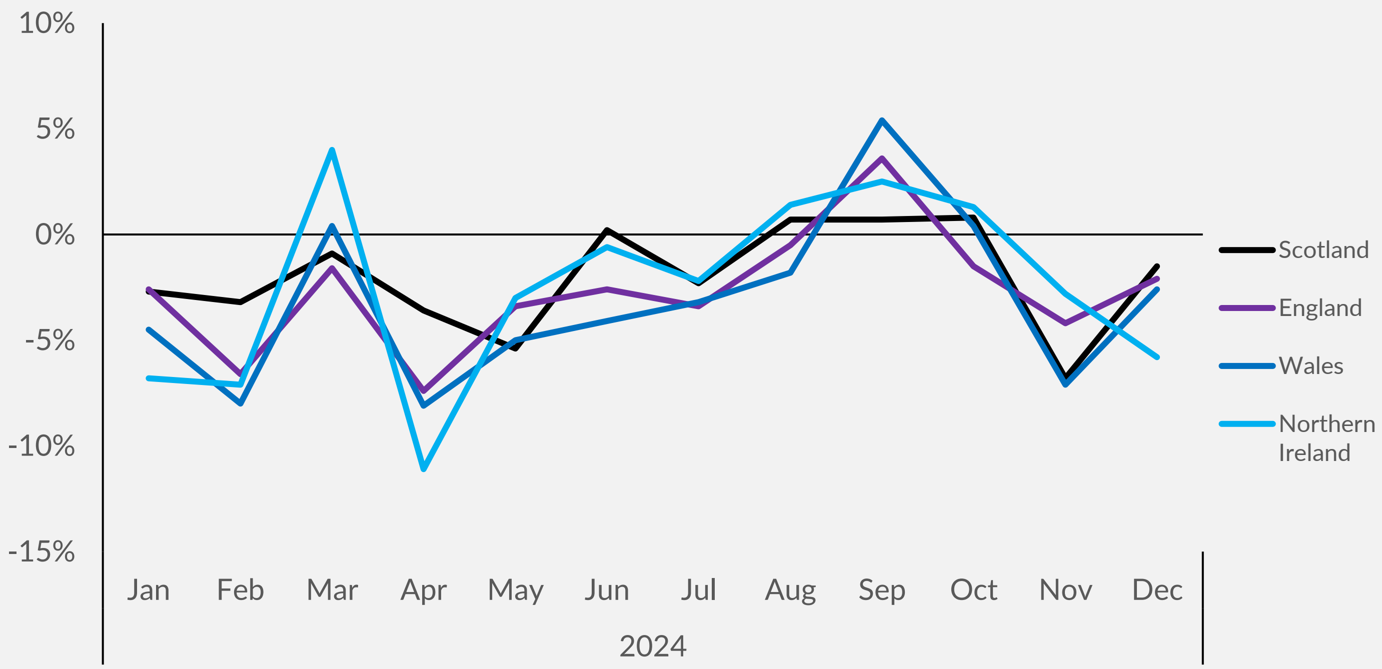
Summary:

- **Retail Park:** A fluctuating trend, with some months showing growth and others seeing declines. Closed the year with no change in footfall.
- **Shopping Centre:** Largely negative, but with occasional positive months. Ended the year with a decline in footfall.
- **High Street:** Primarily a downward trend, with a significant drop early in the year. Finished the year with a moderate decrease in footfall.

UK NATION RETAIL FOOTFALL - BY MONTH

BRC - Sensormatic Footfall Monitor

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



UK NATIONS

Footfall Country Rank (YoY)

Scotland:

- **Dec-24** vs **Dec-23: footfall volume fell ↓1.5%**
- Dec-24 vs Nov-24: **footfall recovery improved ↑5.3pp**
- Compared to other nations, strongest YoY recovery and strongest recovery compared to previous mth

England:

- **Dec-24** vs **Dec-23: footfall volume fell ↓2.1%**
- Dec-24 vs Nov-24: **footfall recovery improved ↑2.1pp**
- Second weakest YoY recovery since July of this year

Wales:

- **Dec-24** vs **Dec-23: footfall volume fell ↓2.6%**
- Dec-24 vs Nov-24: **footfall recovery improved ↑4.5pp**
- Similar to England, second weakest YoY recovery since July of this year

Northern Ireland:

- **Dec-24** vs **Dec-23: footfall volume fell ↓5.8%**
- Dec-24 vs Nov-24: **footfall recovery fell ↓3.0pp**
- Weakest YoY recovery since April of this year

ENGLAND REGION FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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

	Nov-24	Dec-24	Nov-24 rank	Dec-24 rank	Rank Change
South East England	-2.0%	-1.1%	2	1	1
West Midlands	-6.1%	-1.1%	6	1	5
London	-2.1%	-1.2%	3	3	0
North West England	-3.3%	-1.4%	4	4	0
East Midlands	-6.2%	-2.7%	7	5	2
Yorkshire and the Humber	-9.1%	-2.9%	9	6	3
North East England	-9.0%	-3.3%	8	7	1
East of England	-1.8%	-3.4%	1	8	-7
South West England	-4.7%	-4.8%	5	9	-4

ENGLISH REGIONAL RANKINGS

Highest YoY: SE England and West Midlands

- **Dec-24 vs Dec-23: footfall volume fell ↓1.1%**
- Dec-24 vs Nov-24:
    - West Midlands: **footfall recovery improved ↑5.0pp**
    - SE England: **footfall recovery improved ↑0.9pp**
- SE England climbed 1 spot
- West Midlands climbed 5 spots

Lowest YoY: South West England

- **Dec-24 vs Dec-23: footfall volume fell ↓4.8%**
- Dec-24 vs Nov-24: **footfall recovery fell ↓0.1pp**
- Last ranked at the bottom of the table in October of this year, marking the weakest YoY monthly recovery since then.

Highest YoY

SE England

West Midlands

down ↓1.1%

Lowest YoY

SW England

down ↓4.8%

UK CITY FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

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

	Nov-24	Dec-24	Nov-24 rank	Dec-24 rank	Rank Change
Birmingham	-4.7%	+4.8%	4	1	3
Glasgow	-9.4%	+0.2%	10	2	8
Edinburgh	-5.6%	-1.1%	6	3	3
London	-2.1%	-1.2%	2	4	-2
Leeds	-10.8%	-3.0%	11	5	6
Manchester	-2.0%	-3.0%	1	5	-4
Nottingham	-7.4%	-3.3%	7	7	0
Cardiff	-8.6%	-3.5%	9	8	1
Liverpool	-5.5%	-3.8%	5	9	-4
Belfast	-2.3%	-7.2%	3	10	-7
Bristol	-7.8%	-7.5%	8	11	-3

UK CITIES RANKINGS

Major Cities:

- Majority of cities in negative YoY territory
- **Dec-24 City Avg vs Dec-23 City Avg: avg footfall volume down ↓2.6%**
- Compared to Nov 2024 City Avg: **recovery improved ↑3.4pp**
- Second lowest average since July of this year
- Average has been in negative territory for 10 out of 12 months this year

Strongest:

Birmingham

- **Dec-24 vs Dec-23: footfall volume improved ↑4.8%**
- Dec-24 vs Nov-24: **footfall recovery improved ↑9.5pp**
- Second time to top the table this year (first was in May)

Best Performing City

Birmingham

up 4.8%

Weakest:

Bristol

- **Dec-24 vs Dec-23: footfall fell ↓7.5%**
- Dec-24 vs Nov-24: **footfall recovery improved ↑0.3pp**
- Third time at the bottom of the table in the last 6 months

Worst Performing City

Bristol

down ↓7.5%