



**Sensormatic**

by Johnson Controls

Comprehensive measure of  
store customer traffic

Benchmark by UK nations,  
location type and major cities

# BRC-SENSORMATIC FOOTFALL MONITOR

**December 2024**

Period covered:

24 November 2024 – 28 December 2024

# Headline commentary



**Helen Dickinson OBE | Chief Executive | British Retail Consortium**

"A drab December which saw fewer shoppers in all locations, capped a disappointing year for UK retail footfall. This means 2024 is the second year in a row where footfall has been in decline. High streets and shopping centres were hit particularly hard throughout the year as people veered towards retail parks to take advantage of free parking and the variety of larger stores. Even the Golden Quarter, typically the peak of shopping activity, provided little relief, with footfall down over the period. While the Black Friday weekend delivered more promising results, they were overshadowed by a lacklustre festive season.

"Shopping habits have been changing fast and customers are increasingly looking for more experiential shopping, as well as a variety of cafes, services and things to do. Unfortunately, investment in town centres and high streets is held back by our outdated business rates system, which penalises town and city centres. The Government's proposals to reform business rates may ease the burden for some retailers, but it is vital that, ultimately, no shop ends up paying more in rates than before. With retailers facing £7 billion in additional costs this year from increased tax and regulations, the changes to the business rates system must be made in way that supports retail investment and growth in the years ahead."



**Andy Sumpter | Retail Consultant – EMEA | Sensormatic**

"While December saw some flurries of festive footfall around a few key trading days, overall, the picture was filled with much less sparkle as shopper traffic remained subdued in what should have been the highlight of the Golden Quarter. While store visits did build ahead of Christmas, it was never quite enough to reverse the shopper count deficit against last year. As footfall limped towards the festive finish line, December's lacklustre performance compounds a disappointing end to 2024, marking the second consecutive year of declining store traffic. Retailers will now need to look afresh to 2025 and chart a course to adopt innovative strategies to reverse this trend or maximise the sales potential of fewer visitors, finding new ways to make each store visit count."

# 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 ↑1.1pp
- 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 ↑1.0pp
- down

2.7%

% change YoY

#### Shopping Centre

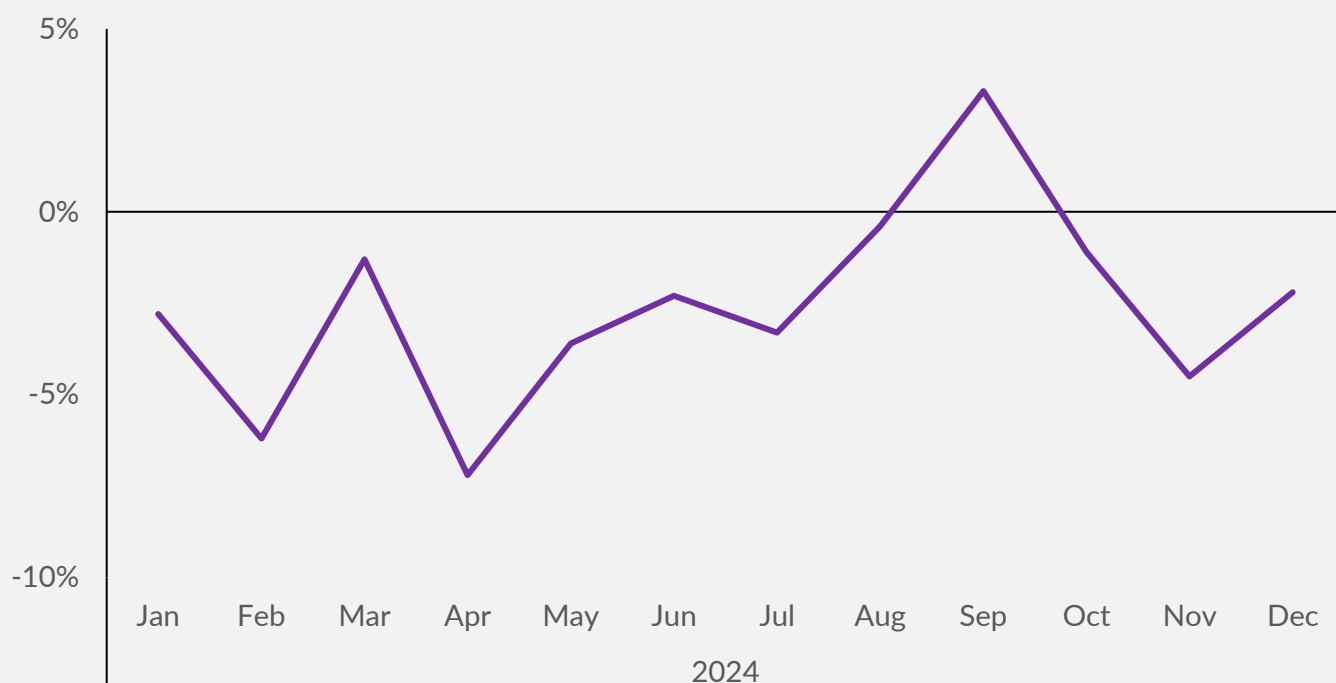
- Footfall volume compared to Dec 2023:
    - Fell ↓3.3%
  - Footfall recovery compared to prior month, Nov 2024:
    - Improved ↑2.8pp
- down

3.3%

% change YoY

pp = percentage points

## 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

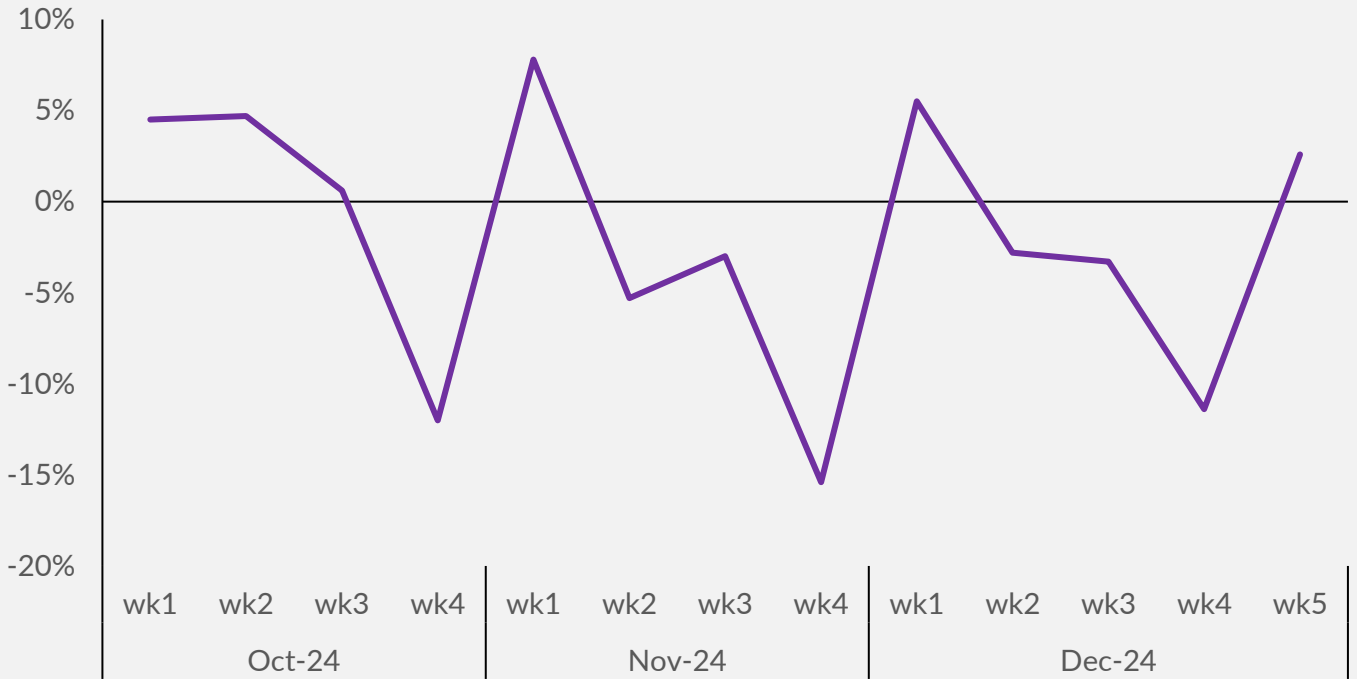
## (GOLDEN QUARTER 2024)

### Oct - Dec

[3-month average]

down ↓2.5%  
Year-on-Year

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

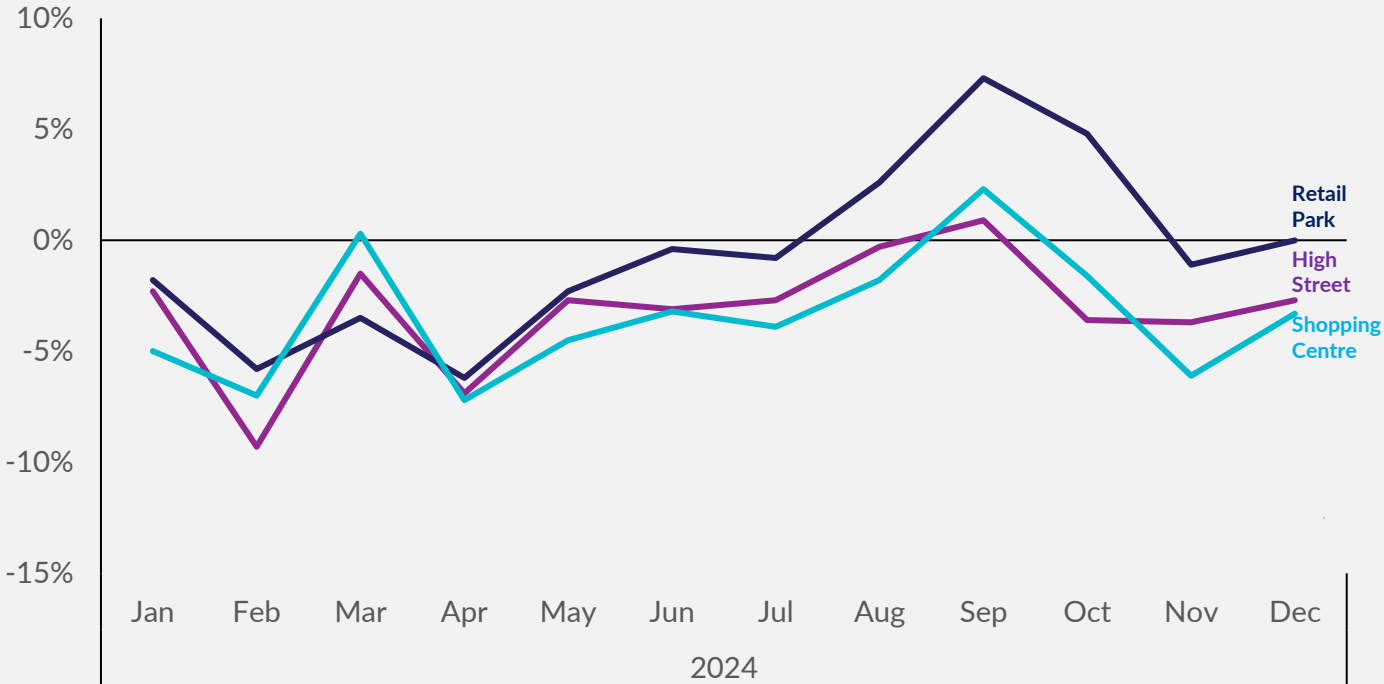
up **↑5.5%**  
Year-on-Year

## DEC-24 BOTTOM WEEK

### Week Four

down **↓11.4%**  
Year-on-Year

## 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 Nov-24: footfall recovery improved ↑1.1pp

High Street:

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

Shopping Centre:

- Dec-24 vs Dec-23: footfall volume fell ↓3.3%
- Dec-24 vs Nov-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%

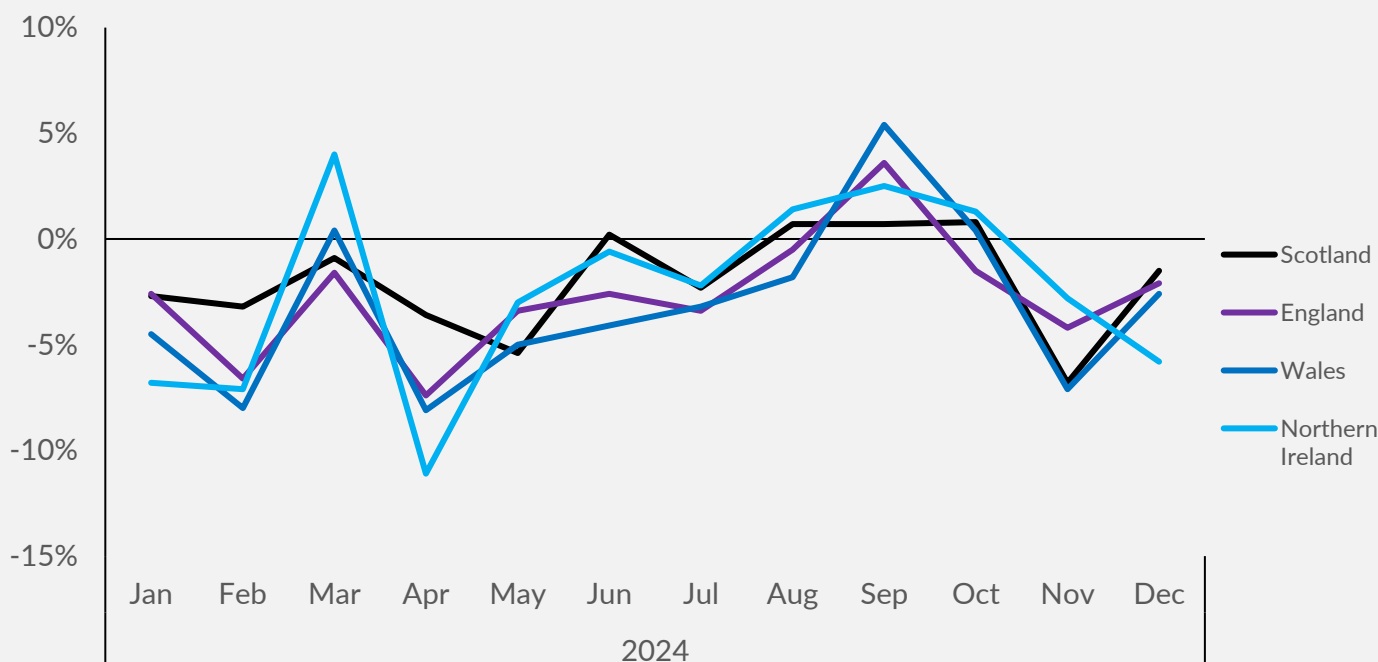
Year-on-Year

Shopping Centre

down ↓3.3%

Year-on-Year

## NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



## UK NATIONS

## 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

## Footfall Country Rank (YoY)



## 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



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

Highest YoY  
**SE England**  
**West Midlands**  
down ↓1.1%

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.

Lowest YoY  
**SW England**  
down ↓4.8%

# UK CITY FOOTFALL – BY MONTH

BRC - Sensormatic Footfall Monitor

	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%**

## 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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