The Great Decoupling:
Why Footfall No Longer Guarantees Sales.

A 360° Analysis of German Urban Commerce & Digital Behaviour (Christmas 2025)

Peter & Betov Retail Analytics
X
MOTION DATA
Datapods
YOUrban

February 2026

Executive Summary

The Retail Paradox: Rising Footfall vs. Staging Sales.

Despite a cautiously optimistic forecast by the German Retail Association (HDE), which expected a 1.5 per cent increase in sales for the Christmas season in November 2025, the actual results for the four weeks of Advent in brick-and-mortar retail were disappointing. Only 22 per cent of retailers were satisfied, while 60 per cent expressed dissatisfaction. Consumer reluctance to spend had solidified, and sentiment remained low.

At the same time, data collected by T-Systems Motion Data and other institutions paint a seemingly contradictory picture: city centres were significantly busier during the Christmas season than in the previous year. **T-Systems Motion Data** shows an average footfall growth of 11 per cent, with particularly strong growth in Stuttgart, Hamburg, Leipzig and Munich. So, people are visibly returning to the cities – and yet sales remain below expectations.

To understand this paradox, it is worth taking a look at consumers' online behaviour. Our analysis of Google searches by **Yourban.ai** and Amazon behavioural metrics by **Datapods** shows a significant slump in digital demand during the Christmas shopping season.

People continue to gather information online, but they are buying less, less frequently and at lower prices. Online retail lost momentum during the Christmas shopping season, as did brick-and-mortar retail. **The data makes it clear that online interest does not automatically lead to online purchases, and increasing offline footfall does not automatically lead to brick-and-mortar sales**. City centres are experiencing a real return of people, but this return is more socially and experience-oriented than purchase-driven. This is fundamentally shifting the role of the city centre.

We have reached a tipping point: Footfall is no longer a proxy for commerce. Instead, it has become a metric for urban vitality. People are seeking atmosphere and social encounters over transactions.

T-Systems Motion Data provides much more than just frequencies: Dwell time, catchment areas and sociodemographics and other can solve the paradox in combination with online data from Yourban.ai and Datapods. Deep research not only became a part of the likes of ChatGPT but are already a necessity in consumer behavioural research for which our partners provide the solution.

Implications and Strategic Compass

Smart data as the foundation of modern, sustainable retail and city marketing

For retail and city marketing, these findings mean that **quality of experience** is becoming a key **competitive advantage**. City centres must create emotional anchor points, showcase cultural diversity and design spaces that people enjoy visiting. Only when the quality of stay and inspiration are right will people be willing to buy.

At the same time, **data-based management** is becoming indispensable. Footfall measurements, movement analyses and target group understanding show what really attracts people and **how behaviour is changing**. AI-supported forecasts make it possible not only to look back, but also to simulate future scenarios – for example, for events, industry mix, quality of stay or space development. **City marketing** thus becomes a **data-intelligent discipline** that actively shapes urban transformation.

The future of successful city centres lies in **combining emotion and intelligence**: **smart data** becomes a strategic compass that makes cities resilient, diverse and vibrant – and shows that while Footfall reveals what is possible, it is quality and relevance that ultimately determine whether visits translate into added value.

Overall results

Footfall is not enough:

Data collected by T-Systems Motion Data and other institutions paint a seemingly contradictory picture: city centres were significantly busier during the Christmas season than in the previous year. T-Systems Motion Data shows an average footfall growth of 11 per cent, with particularly strong growth in Stuttgart, Hamburg, Leipzig and Munich. So, people are visibly returning to the cities – and yet sales remain below expectations.

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Google Search queries fell by three per cent, the Amazon conversion rate dropped by six per cent, the average order value by twelve per cent and the shopping basket value by as much as fourteen per cent.

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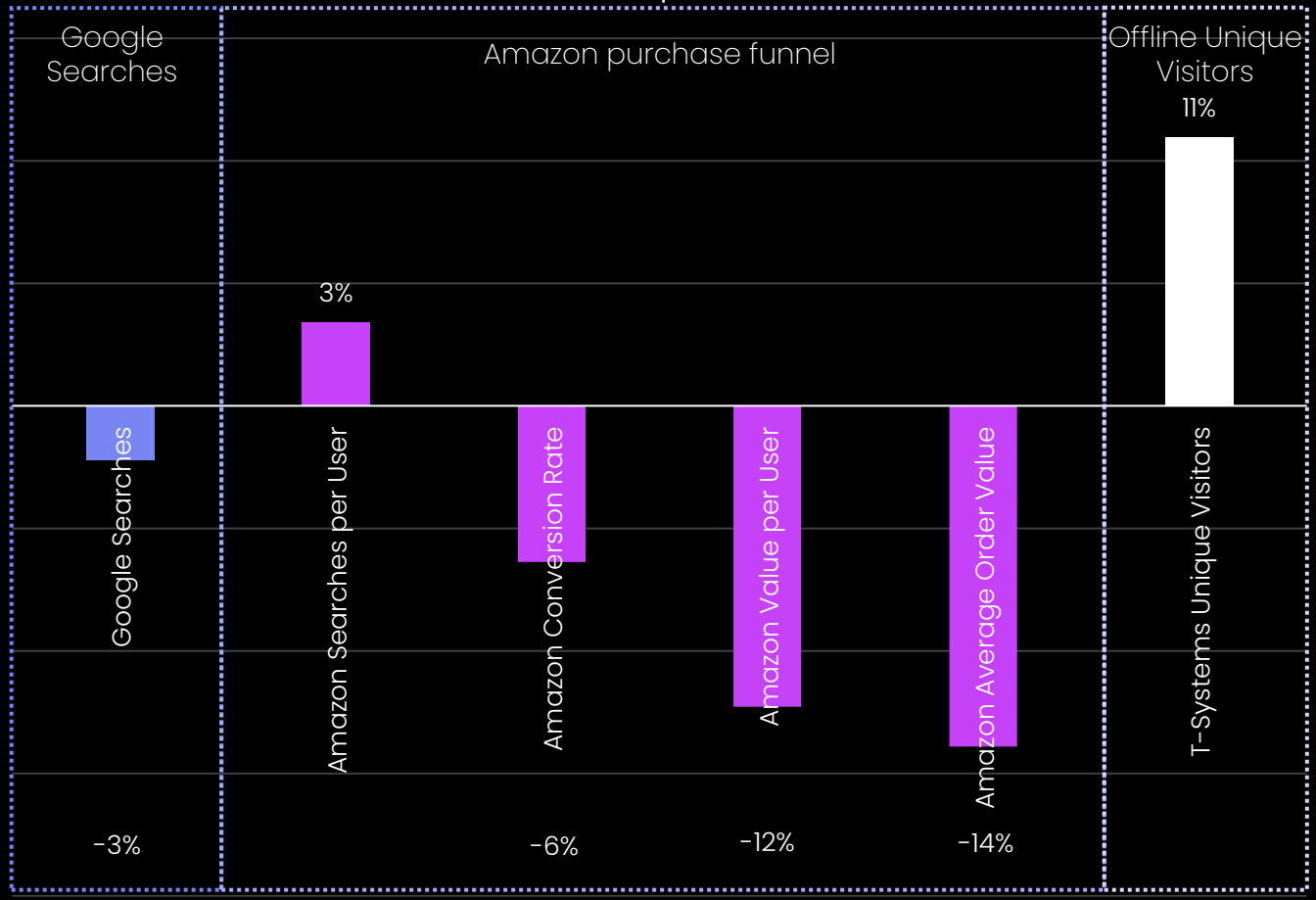
December 2024 vs December 2025 year-on-year weighted-average change for Google Searches, Amazon consumer behaviour, and offline Unique Visitors



YOUrban Datapods

Urban Renaissance:

Motion Data and Visitor Growth Across Major German Cities

T-Systems' Motion Data give us a clear positive trend of Unique Visitors to Points of Sales like Shopping Centres and high streets per city.

Overall, the cities investigated reach a weighted average growth rate of Unique Visitors of 11% when comparing December values for 2024 vs 2025.

This is a definite positive trend that goes against sales and transaction expectations of retailers and the HDE as explained in the Executive Summary.

We can see that while footfall indications alone show what happened but not the how and why and within which population – T-Systems' Motion Data provide those values like Catchment Area analyses, sociodemographic data and behavioural information that might be crucial for future evaluations in combinations with the following providers' data from Yourban.ai and Datapods.

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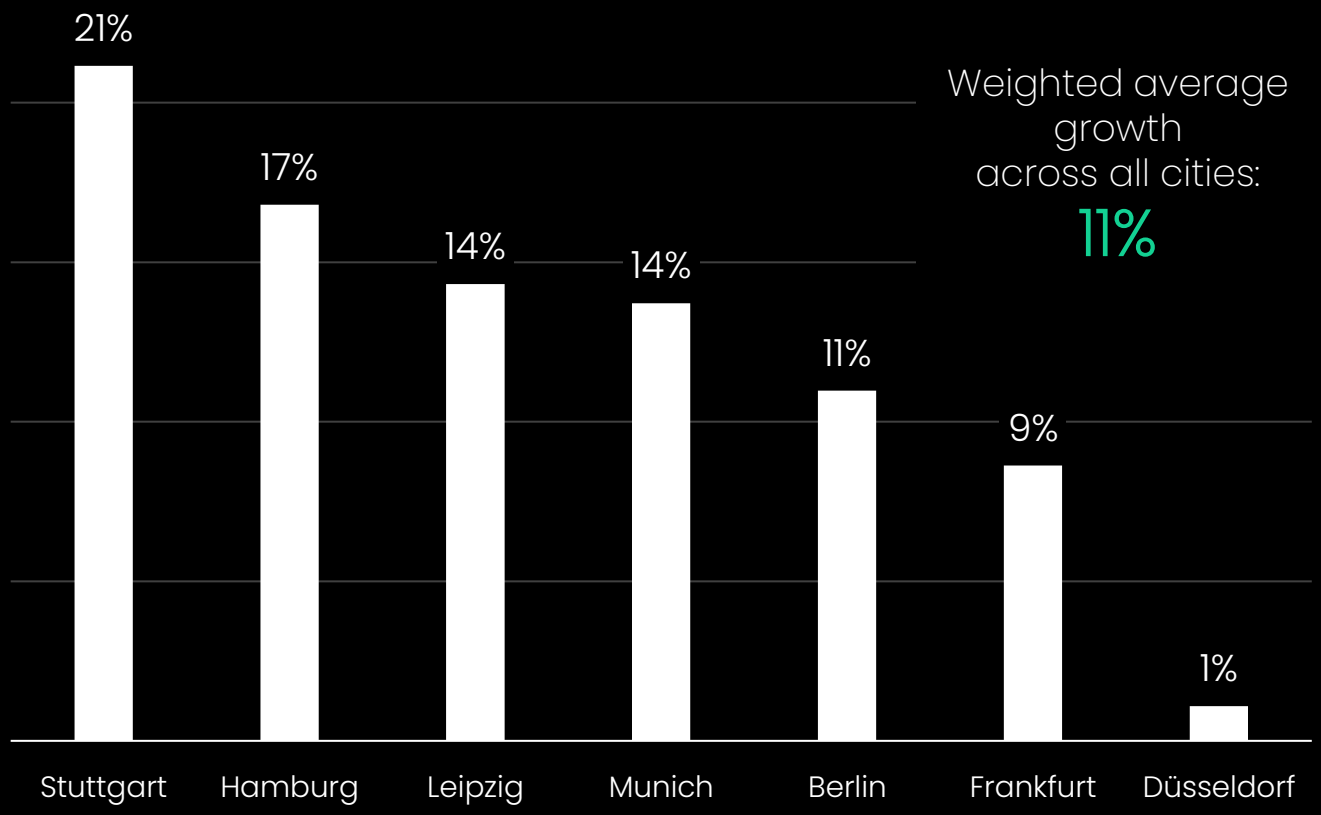
MOTION DATA

December 2024 vs December 2025
Unique Visitor growth per city



Weighted average growth across all cities:

11%

E-Commerce Erosion:

Analysing the Amazon Purchase Funnel

Datapods provided us with detailed and representative panel data of their user's behaviour on Amazon.

It is noteworthy that in December 2025, there were more searches for products per user on Amazon than in 2024.

However, this is where the sales funnel seems to erode showing a negative trend in overall purchases to searches conversion rates and even more noticeable a rather strong negative trend of purchase values per user and average order values.

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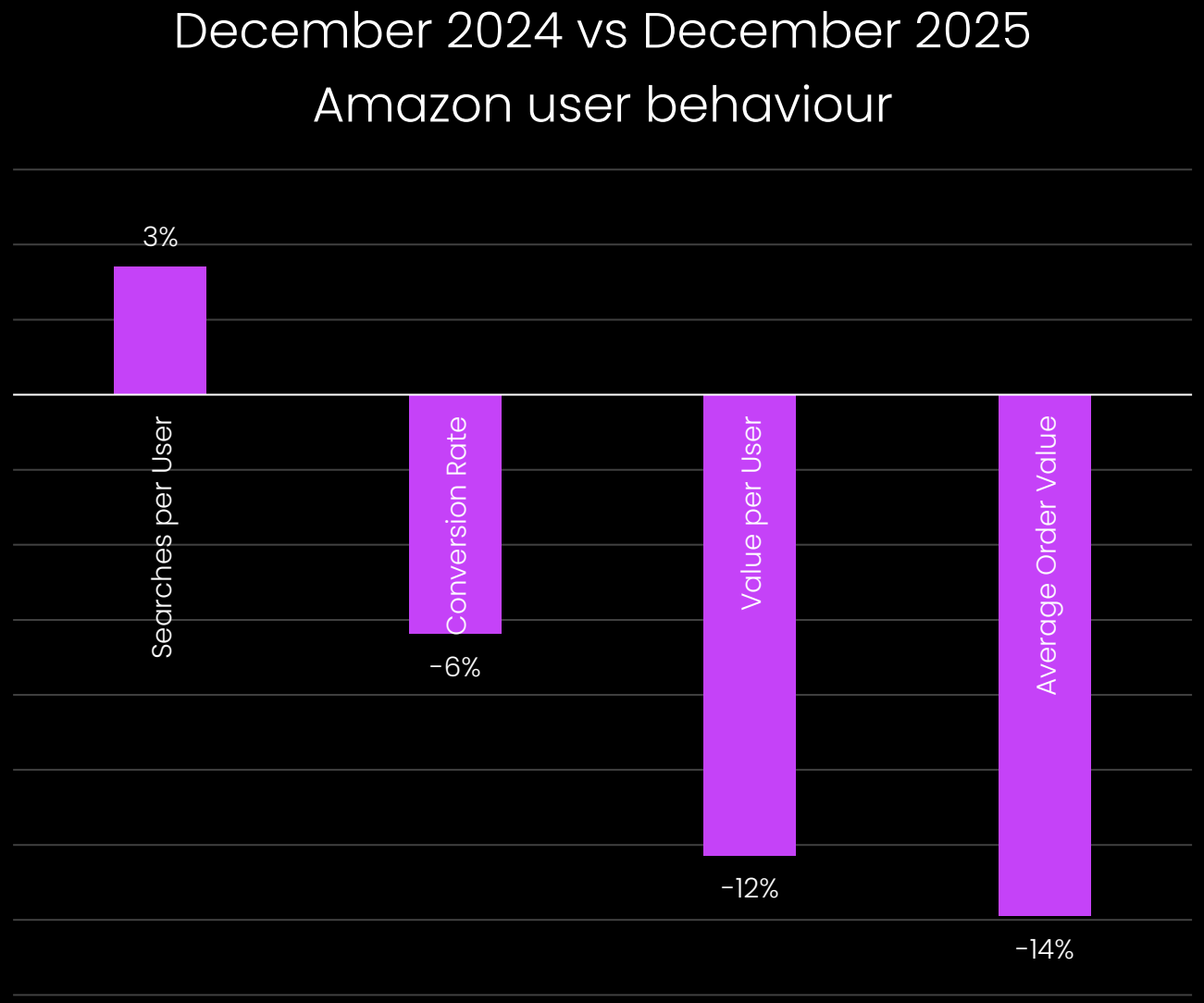
Datapods



Weekly Behavioral Shift:

"Last-Minute Migration" from High Street Visits to Amazon Gift Searches

Datapod's Amazon user behaviour data clearly show a higher search interest (+3 and +9% Searches per User) while all following steps of the purchase funnel follow a negative trend 2024 vs 2025.

Interestingly, we notice a change in weekly values: While T-Systems' Motion Data show an a higher 2024 on '25 increase for the first week of December than for the week before Christmas, the contrary happens for Amazon searches.

We can thus assume a tendency among consumers to visit high streets and shopping centres at the beginning of December, while the week before Christmas online searches increase due to more "hastily" needing fitting Christmas gifts on Amazon.

Another interpretation might be an increased search for cheaper alternatives to offline shopping – as indicated through the lower purchase Value per User and Average Order Value within Amazon for 2024 vs 2025.

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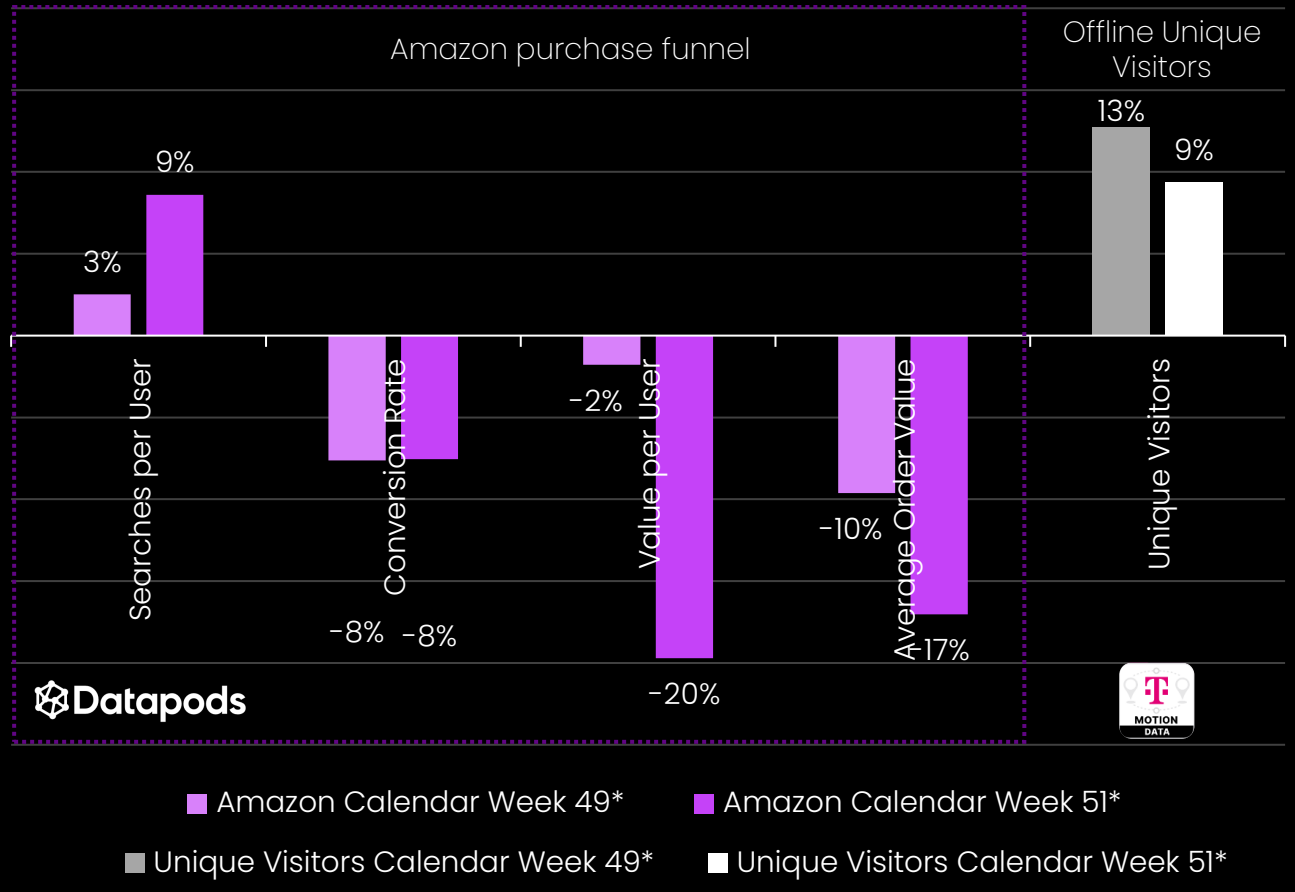
Amazon user behaviour and T-Systems Unique Visitors by Year-on-Year change by Calendar Week



Digital Demand by City as measured by Google keyword searches per city:

Brand Interest Rises as Gift-Specific Searches slump

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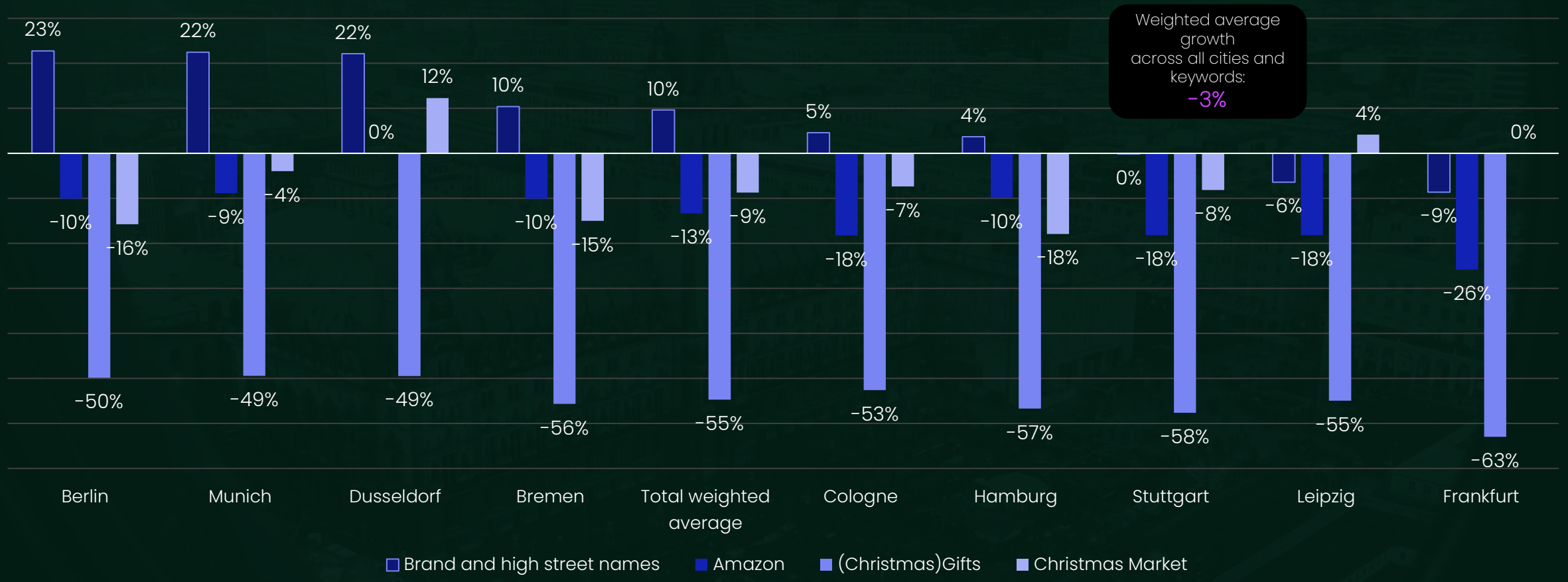
End of 2024 vs End of 2025 relevant Google keyword Searches per city



See next page for analysis and interpretation

Google Searches vs. Unique Visitors by city: Behavioral Mismatch

The Divergence of Search and Visit Patterns

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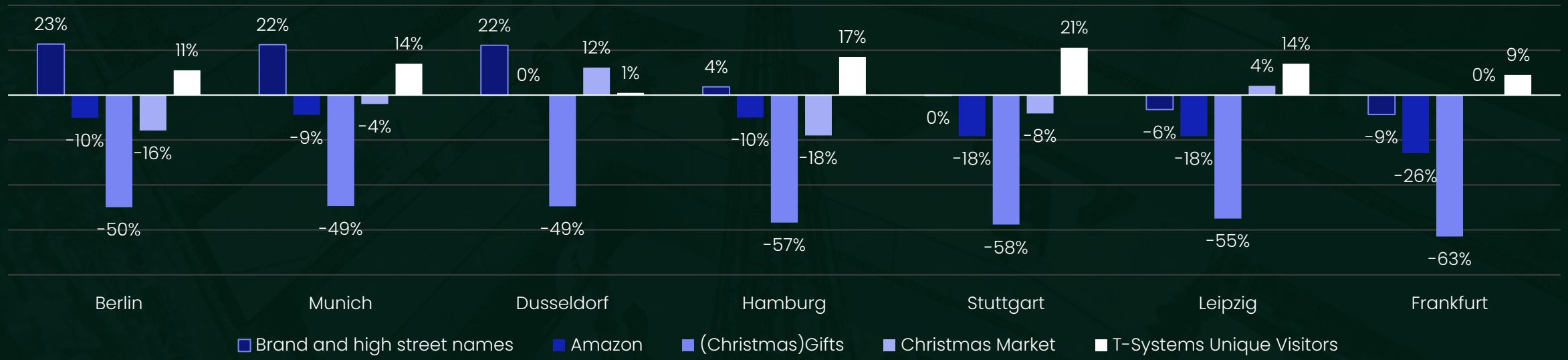
End of 2024 vs End of 2025 relevant Google keyword Searches per city vs.
December 2024 vs 2025 Unique Visitors to Points of Sales per city



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The data reveals a critical divergence in consumer behaviour. Brand-specific searches and high street names are the only digital categories showing resilience, trending upward between 2024 and 2025. In contrast, generic product searches ('Amazon,' 'Christmas Gifts') follow the broader slump in e-commerce conversion.

Most notably, there is a distinct mismatch regarding Christmas Markets: while digital search volume for these events has decreased, T-Systems' Motion Data shows a significant increase in physical footfall at points of sales areas. This confirms that city centres are being reclaimed as experiential spaces—the visit is driven by the desire for atmosphere and social encounter, which often bypasses the traditional digital search-to-purchase funnel. **Motion Data provides further consumer behavioural KPIs like Dwell Time, sociodemographics or catchment areas, that contain further necessary information that is needed to solve the Retail Paradox.**

Methodology and content

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Search Keywords used for Yourban.ai Google search trends analyses per city

YOUrban

Brands:
rituals
douglas
saturn
media markt
adidas
hollister
nike
boss
lacoste
peek & cloppenburg
h&m
zara
only
mango
jack & jones
uniqlo
deichmann
snipes
new yorker
tk maxx
kaufland

"Gifts":
gift (GER: geschenk)
christmas gift (GER: weihnachtsgeschenk)

"Amazon":
"amazon"

High street names per city:
Berlin: "kurfürstendamm"
Bremen: "obernstraße"
Cologne: "schildergasse"
Dortmund: "westenhellweg"
Düsseldorf: "schadowstraße"
Frankfurt am Main: "zeil"
Hamburg: "mönckebergstraße"
Leipzig: "petersstraße"
Munich: "theatinerstraße"
Stuttgart: "königsstraße

Time periods used for calculating absolute values and deltas between periods:

Sum of November and December 2024 vs Sum of November and December 2025 of monthly absolute keyword searches per city

About us

Peter & Betov Retail Analytics

www.pb-analytics.de

Peter & Betov Retail Analytics is a data-driven consultancy that specialises in the application of data science and artificial intelligence (AI) to analyse visitor movements, location potential and target group behaviour.

They offer retailers, operators of commercial platforms, commercial property owners, asset management companies and local authorities intelligent, AI-supported location and target group analyses that enable data-based decision-making and precise forecasts.

Models are based on empirical data, statistical methods and machine learning – and provide reliable recommendations for action that go beyond intuition or subjective assessment. In addition, they contribute in-depth expertise in the design of urban retail spaces and the strategic development of city centres and shopping centres.

Peter & Betov Retail Analytics also offers data-driven and AI-supported solutions for optimising tenancies and rents, location strategies and space utilisation in retail and commercial real estate. The aim is to increase property value, minimise risks and tap into new potential.

YOUrban

www.yourban.ai

YOURBAN is a demand intelligence platform that analyses local internet searches (Google, TikTok, GPT, etc.) to help businesses detect emerging trends, understand consumer needs, and generate traffic at stores.

Using AI, Yourban transforms these signals into concrete recommendations to optimise local visibility, guide development strategies, create geolocated SEO/SEA content, and track the performance of each area via dynamic dashboards.

Adopted by more than 130 public and private players (retailers, developers, local authorities), the solution is aimed at all organizations with a physical presence in the territory. It enables marketing, development, and strategy departments to align their decisions with the reality of local demand.

About us

dih.telekom.com/en/motion-data

Utilizing informed decision-making can extend and accelerate business growth while reinforcing significant competitive advantage.

T-Systems Motion Data leverages analytics based on geo-information – that provides dependable insights into movement and traffic patterns in public areas. This valuable information can be harnessed to strategize, construct, and expand customer acquisition efforts effectively.

Gain better insights about your visitors with answers to essential questions:

1. Who are my visitors, where do they come from and how long do they stay?
2. Which locations have the highest volume of potential customers?
3. What is the spending capacity of my visitors?
4. What are the best areas that could draw visitors to my advertising display?
5. At what locations and times does a specific route experience high levels of congestion?

datapods.app/de/business

Datapods is a next-generation consumer intelligence engine that provides businesses with deep insights into data traditionally siloed within "walled gardens" from TikTok, Google, Amazon, and Meta. We empower brands to move beyond the surface, offering clarity on customer segmentation, social media attribution, and complex offsite customer journeys.

By leveraging data from a representative user base, we illuminate the "black boxes" of the digital ecosystem. Whether you are measuring the brand lift of a social campaign, optimizing content strategy, or identifying why a customer chose a competitor over your product, Datapods provides the answers.

Our AI-driven platform allows you to deploy complex inquiries and receive high-quality, actionable insights in minutes, making enterprise-level consumer intelligence more accessible than ever.

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