MRI OnLocation Index

Week 41, 2023, Sun-Sat

Week commencing 08 October 2023

Last week footfall declined for the second consecutive week across all UK retail destinations which is likely to be due to the heavy rain across various parts of the country. This is a deterioration compared with the same week in 2022 when footfall rose in two of the three retail destination types monitored by MRI Software.

The weather played a key factor in footfall performance across UK retail destinations last week as activity fell each day from the week before except for Monday and Saturday. However high streets performed better in the first half of the week which we expect to be due to the surprisingly warm weather but the adverse weather conditions towards the end of the week wiped out all of the gains that had been made.

This impact was also felt across all regions with the exception of North & Yorkshire and Northern Ireland where there were marginal rises. Scotland, in particular, saw a significant rebound from the previous week when the region was affected by heavy rain and flooding. Footfall in Central London rose marginally which is likely to be a bounce back from the week before when rail strikes occurred.

Due to these challenging weather conditions last week, footfall declined year on year across all UK retail destination types and the gap from the 2019 level widened marginally.

Footfall declined by -1.5% across all UK retail destinations last week from the week before, primarily driven by high streets where activity fell by -2.0% as a result of the adverse weather conditions experienced towards the end of the week. This is a slight deterioration from the same week last year when footfall rose by +0.8% across all UK retail destinations week on week. Footfall in shopping centres and retail parks also declined by -0.7% and -1.2% respectively.

The week started strongly for high streets as footfall rose by an average of +1.9% from Sunday to Tuesday likely to be as a result of the surprisingly warm weather for this time of the year. This was reflected in a decline across retail parks and shopping centres averaging -3.1% and -3.5% respectively for the same time period. As the week progressed, and the weather worsened, high streets bore the brunt of the decline with a double digit drop recorded on Friday and Saturday, averaging -7.2%, versus rises in shopping centres (+1.5%) and retail parks (+2.6%), wiping out all of the gains made earlier in the week.

Regionally footfall declined across most areas from the week before except for marginal rises in North & Yorkshire (+0.8%) and Northern Ireland (+0.8%). There was a significant uplift in activity in Scotland as footfall rose by +3.2% from the week before when heavy rain and flooding impacted the region. Footfall in Central London also saw a marginal improvement from the week before as employees returned to offices following the rail strikes in the week before which was reflected by a rise of +0.6% in MRI OnLocation's Central London 'Back to the office' benchmark.

As a result of last week's performance, footfall declined year on year by -1.5% across all UK retail destinations which is a deterioration from the week before when it rose by +0.8%. High streets and shopping centres saw an annual drop in footfall of -1.7% however there was a much more modest drop in footfall across retail parks of -0.7%. The gap from the 2019 level widened marginally across all UK retail destinations to -10.4% from -10.1% in the week before last.

Footfall index
2023 vs 2022
-1.5%
week on week
-1.5%

High streets
2023 vs 2022
-1.7%
week on week
-2.0%

Shopping centres
2023 vs 2022
-1.7%
week on week
-0.7%

Retail parks
2023 vs 2022
-0.7%
week on week
-1.2%

James Massey, Managing Director
OnLocation for Footfall Analytics
MRI Software

Week 41, 2023, Sun-Sat

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2023 vs 2019: MRI OnLocation Index

The impact of Covid-19 on footfall means that subsequent to the anniversary of Lockdown 1 (23rd March 2021), it is important to add a further annual comparison of 2023 versus 2019 in order to compare to the last normal trading year. Being able to measure and compare the change in footfall over the last four years will equip you with the relevant data and insights to truly put your performance into context and continue making data driven decisions.

Footfall index
2023 vs 2019
-10.4%
week on week
-1.5%

High streets
2023 vs 2019
-10.9%
week on week
-2.0%

Shopping centres
2023 vs 2019
-15.8%
week on week
-0.7%

Retail parks
2023 vs 2019
-3.4%
week on week
-1.2%

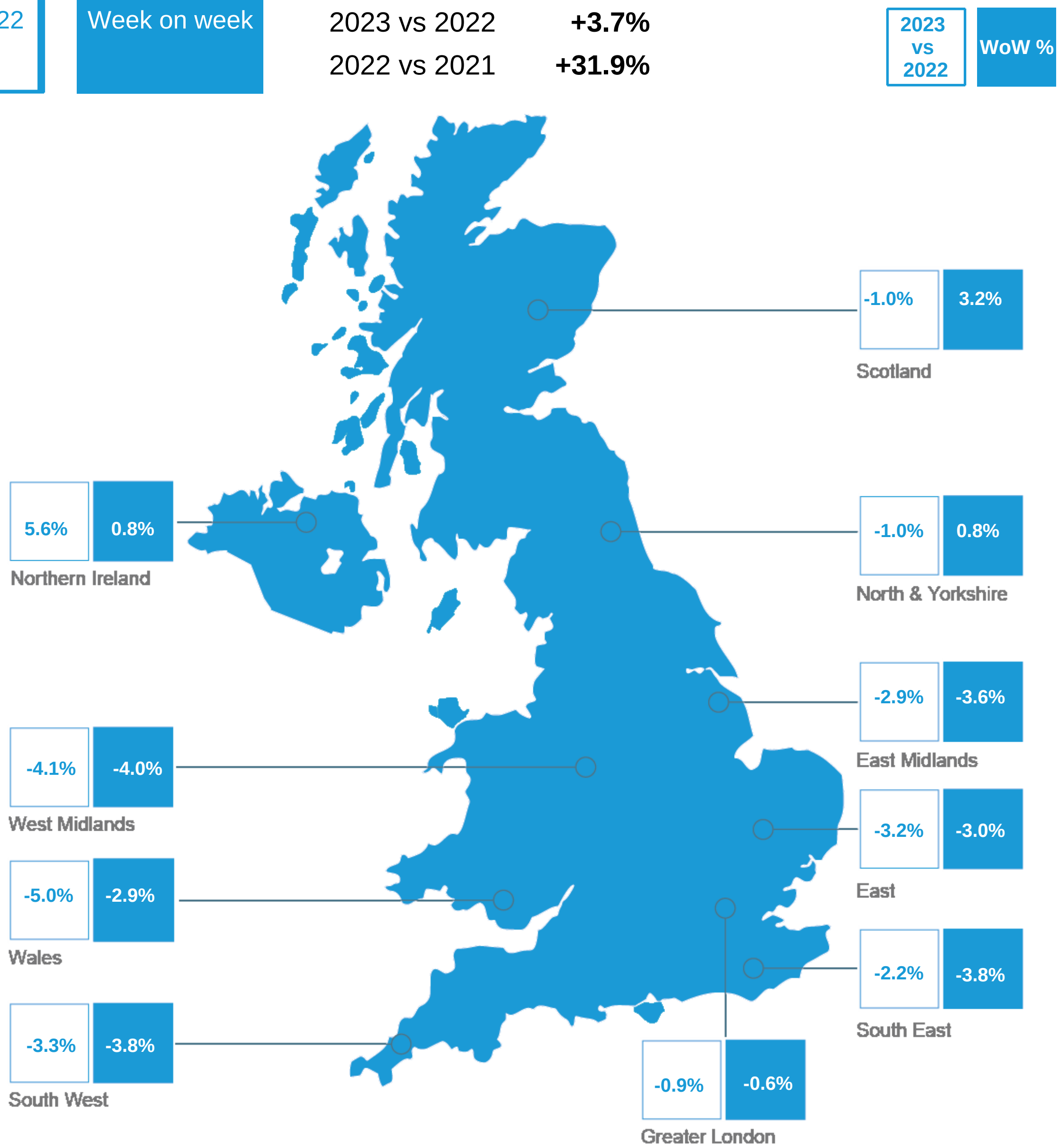
James Massey, Managing Director
OnLocation for Footfall Analytics
MRI Software

MRI OnLocation index

-1.5%
2023 vs 2022

-1.5%
Week on week

Year to date	
2023 vs 2022	**+3.7%**
2022 vs 2021	**+31.9%**



The MRI OnLocation Index is a national index, encompassing the overall UK result for each of the three destination types. The result for each destination type is based on the comparison of the average footfall volume across all individual locations of that type between one period and another (eg. last week and the same week last year). The MRI OnLocation Index is an average of these results, weighted by their respective influence in terms of footfall volume.

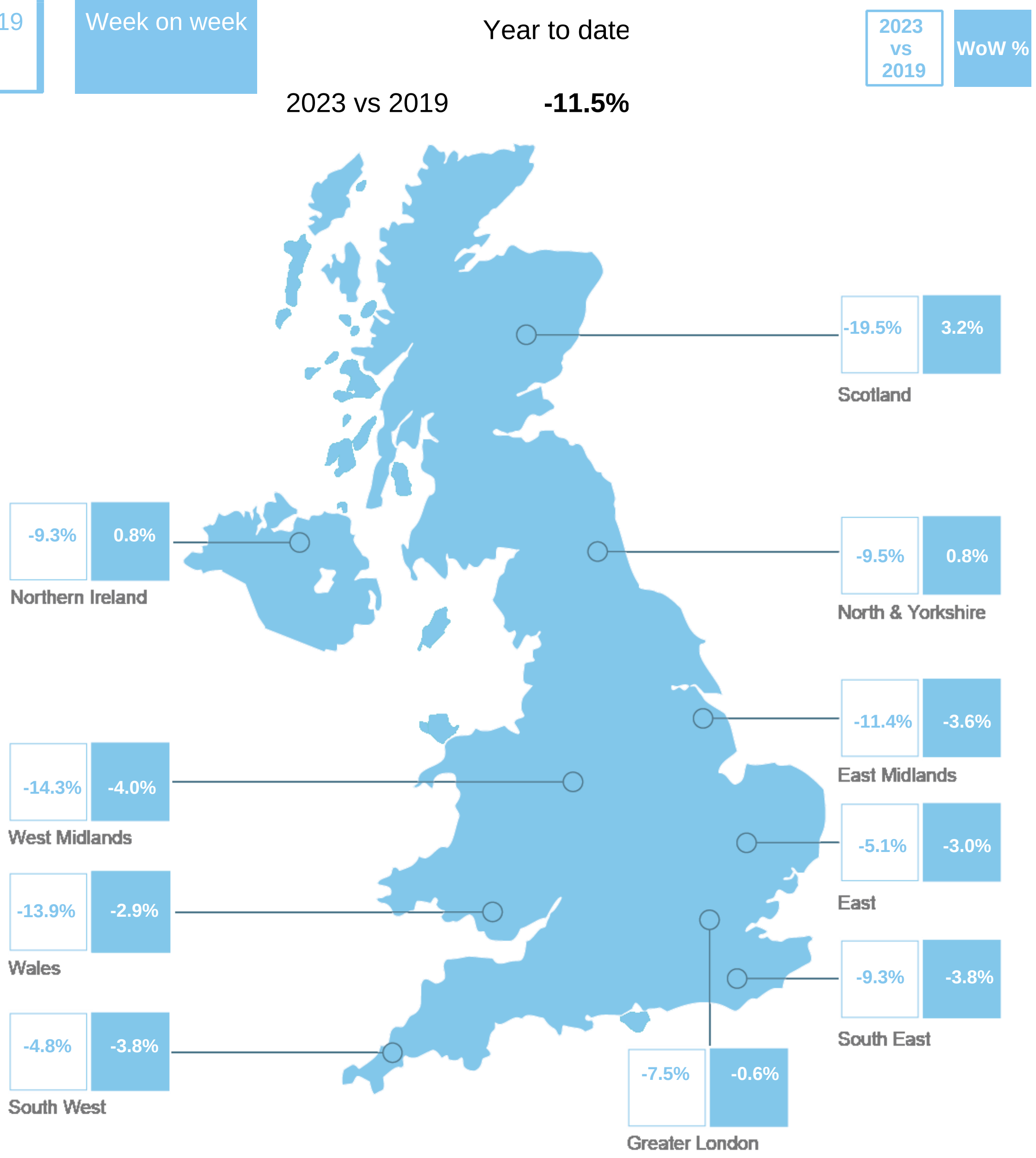
2023 vs 2019: MRI OnLocation index

-10.4% 2023 vs 2019

-1.5% Week on week

Year to date

2023 vs 2019 **-11.5%**



The MRI OnLocation Index is a national index, encompassing the overall UK result for each of the three destination types. The result for each destination type is based on the comparison of the average footfall volume across all individual locations of that type between one period and another (eg. last week and the same week 2019). The MRI OnLocation ndex is an average of these results, weighted by their respective influence in terms of footfall volume.

High street index

High street results by region

	2023 vs 2022	WoW%
East	-4.9%	-5.1%
East Midlands	-3.9%	-6.0%
Greater London	0.5%	-1.5%
Northern Ireland	3.7%	0.6%
North & Yorkshire	-2.1%	0.9%
Scotland	-0.3%	7.3%
South East	-1.7%	-5.2%
South West	-1.9%	-5.6%
Wales	-5.4%	-4.1%
West Midlands	-7.6%	-4.7%

-1.7%
Year on year

-2.0%
Week on week

Year to date :		
	2023 vs 2022	+4.4%
	2022 vs 2021	+39.0%

	Central London	Outer London	Regional Cities excl London	Market towns	Coastal towns	Historic towns
Year on year	+2.4%	-1.7%	-1.8%	-4.5%	+0.4%	-2.1%
Week on week	+0.3%	-3.4%	-0.2%	-1.1%	-0.7%	-4.4%

2023 vs 2019: High street index

High street results by region

	2023 vs 2019	WoW%
East	-2.4%	-5.1%
East Midlands	-7.9%	-6.0%
Greater London	-11.3%	-1.5%
Northern Ireland	-12.8%	0.6%
North & Yorkshire	-10.8%	0.9%
Scotland	-21.3%	7.3%
South East	-8.2%	-5.2%
South West	-8.9%	-5.6%
Wales	-12.6%	-4.1%
West Midlands	-17.5%	-4.7%

-10.9%
2023 vs 2019

-2.0%
Week on week

Year to date : 2023 vs 2019 -13.9%

Central London	Outer London	Regional Cities excl London	Market towns	Coastal towns	Historic towns
-14.9% 2023 vs 2019	**-5.1%** 2023 vs 2019	**-8.9%** 2023 vs 2019	**-12.4%** 2023 vs 2019	**-14.7%** 2023 vs 2019	**-7.7%** 2023 vs 2019
+0.3% Week on week	-3.4% Week on week	-0.2% Week on week	-1.1% Week on week	-0.7% Week on week	-4.4% Week on week

Shopping centre index

Shopping centre results by region

	2023 vs 2022	WoW%
East	1.0%	-1.1%
East Midlands	-3.4%	-2.4%
Greater London	3.8%	0.2%
North & Yorkshire	-2.9%	0.9%
Scotland	-2.4%	3.5%
South East	-1.5%	-2.5%
South West	-7.4%	-3.1%
Wales	-8.1%	-3.5%
West Midlands	-1.2%	-4.2%

-1.7%
Year on year

-0.7%
Week on week

Year to date :	2023 vs 2022	+4.5%
	2022 vs 2021	+37.6%

	Up to 100,000 Sqft	100,000 to 250,000 Sqft	250,000 to 500,000 SqFt	500,000 Sqft and above
Year on year	-2.6%	-2.5%	-2.7%	-1.2%
Week on week	-1.2%	-0.5%	-1.2%	-0.5%

2023 vs 2019: Shopping centre index

Shopping centre results by region

	2023 vs 2019	WoW%
East	-16.0%	-1.1%
East Midlands	-26.9%	-2.4%
Greater London	-6.3%	0.2%
North & Yorkshire	-14.5%	0.9%
Scotland	-24.6%	3.5%
South East	-15.1%	-2.5%
South West	-18.1%	-3.1%
Wales	-27.0%	-3.5%
West Midlands	-13.2%	-4.2%

-15.8%
2023 vs 2019

-0.7%
Week on week

Year to date : 2023 vs 2019 -15.1%

Up to 100,000 Sqft

-12.2%
2023 vs 2019

-1.2%
Week on week

100,000 to 250,000 Sqft

-18.7%
2023 vs 2019

-0.5%
Week on week

250,000 to 500,000 SqFt

-16.8%
2023 vs 2019

-1.2%
Week on week

500,000 Sqft and above

-15.9%
2023 vs 2019

-0.5%
Week on week

Retail park index

Retail park results by region

	2023 vs 2022	WoW%
East	-4.2%	-0.5%
East Midlands	-0.4%	0.3%
Greater London	-9.0%	0.4%
North & Yorkshire	3.6%	0.5%
Scotland	-1.0%	-6.0%
South East	-3.8%	-2.1%
South West	-1.9%	-0.5%
Wales	-0.9%	0.4%
West Midlands	0.1%	-2.2%

-0.7%
Year on year

-1.2%
Week on week

Year to date :		
	2023 vs 2022	+1.5%
	2022 vs 2021	+10.4%

+1.1% Year on year
-0.6% Week on week

Up to 125,000 SqFt

+2.5% Year on year
-0.2% Week on week

125,000 - 200,000 SqFt

-1.8% Year on year
-0.1% Week on week

200,000 - 275,000 SqFt

-2.9% Year on year
-3.2% Week on week

Over 275,000 SqFt

2023 vs 2019: Retail park index

Retail park results by region

	2023 vs 2019	WoW%
East	0.6%	-0.5%
East Midlands	-2.6%	0.3%
Greater London	-0.4%	0.4%
North & Yorkshire	-1.3%	0.5%
Scotland	-10.4%	-6.0%
South East	-5.7%	-2.1%
South West	18.2%	-0.5%
Wales	-2.9%	0.4%
West Midlands	-8.6%	-2.2%

-3.4%
2023 vs 2019

-1.2%
Week on week

Year to date : 2023 vs 2019 -2.4%

-3.0%
2023 vs 2019

-0.6%
Week on week

Up to 125,000 SqFt

-1.7%
2023 vs 2019

-0.2%
Week on week

125,000 - 200,000 SqFt

-5.9%
2023 vs 2019

-0.1%
Week on week

200,000 - 275,000 SqFt

-3.6%
2023 vs 2019

-3.2%
Week on week

Over 275,000 SqFt

REAL ESTATE SOFTWARE

Week 41, 2023, Sun-Sat

Week commencing 08 October 2023

UK weather report

Aberdeen

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	13°	15°	20°	20°	14°	14°	14°
2022	15°	14°	13°	13°	15°	14°	13°
2019	13°	13°	13°	13°	15°	14°	14°

Leeds

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	22°	21°	22°	22°	18°	14°	13°
2022	15°	16°	15°	14°	15°	15°	16°
2019	14°	14°	15°	13°	14°	15°	15°

Norwich

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	22°	23°	24°	24°	21°	20°	20°
2022	16°	17°	15°	16°	16°	16°	16°
2019	14°	14°	17°	15°	16°	17°	14°

Edinburgh

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	16°	17°	19°	19°	12°	13°	13°
2022	13°	14°	13°	13°	15°	14°	12°
2019	12°	14°	13°	12°	13°	13°	13°

Liverpool

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	22°	22°	20°	20°	17°	15°	13°
2022	15°	15°	14°	15°	15°	16°	15°
2019	15°	15°	15°	13°	16°	15°	15°

London

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	25°	25°	25°	24°	20°	20°	20°
2022	17°	18°	16°	16°	17°	17°	16°
2019	15°	15°	17°	16°	17°	17°	14°

Glasgow

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	15°	16°	17°	17°	12°	12°	12°
2022	13°	14°	12°	12°	13°	14°	11°
2019	12°	15°	12°	12°	13°	12°	12°

Manchester

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	22°	22°	22°	22°	17°	14°	14°
2022	16°	16°	14°	15°	14°	15°	16°
2019	14°	14°	14°	13°	14°	14°	15°

Cardiff

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	24°	24°	23°	19°	19°	19°	19°
2022	17°	17°	17°	16°	16°	17°	16°
2019	15°	16°	15°	14°	16°	16°	14°

Newcastle

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	18°	19°	19°	19°	16°	14°	12°
2022	15°	15°	14°	14°	16°	15°	15°
2019	13°	13°	14°	13°	13°	13°	13°

Nottingham

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	22°	23°	23°	22°	18°	16°	16°
2022	15°	17°	15°	14°	15°	16°	17°
2019	15°	14°	16°	15°	15°	15°	15°

Bristol

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	23°	23°	22°	19°	19°	20°	19°
2022	17°	18°	17°	16°	17°	18°	16°
2019	15°	15°	14°	13°	15°	15°	14°

Belfast

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	19°	20°	20°	20°	13°	13°	13°
2022	14°	14°	13°	14°	14°	15°	13°
2019	15°	16°	14°	13°	15°	14°	14°

Birmingham

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	23°	24°	24°	19°	18°	18°	18°
2022	16°	17°	15°	14°	15°	16°	17°
2019	15°	14°	15°	14°	15°	15°	14°

Exeter

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2023	25°	24°	24°	22°	20°	20°	20°
2022	18°	18°	17°	17°	17°	18°	17°
2019	16°	17°	16°	15°	17°	17°	14°