

A slow September for UK retail destinations as footfall dropped again by -2.8% with consumers tightening purse strings ahead of the Christmas season



Footfall across UK retail destinations declined by -2.8% from August to September 2023, which appears to follow a historical trend where we typically see a drop in footfall from these months.

This trend is also reflected in the annual performance weakening year on year as footfall rose by only +1.6% in September 2023 versus a +6.8% rise in September 2022 from the year before. This weakening in activity can also be seen across recent months; in August footfall was +1.9% higher than 2022, in July it was +2.1% higher, and in June it was +4.2% higher than the previous year. While there was a natural bounce back in footfall post-pandemic, the momentum is now starting to fall back in line with a pre-pandemic trend.

The decline in footfall for September compared to the previous month was particularly noticeable in high streets and shopping centres, as footfall dropped by -3.2% and -3.7% respectively. Whereas retail parks saw a more modest decline of -1%. This could be a sign of shoppers continuing to exercise caution in the face of rising interest rates and the burden of the cost of living, which is undoubtedly impacting their spending power especially as we start to prepare for the Christmas season.

Weekday footfall declined by -4.5% in September compared with a rise of +2.7% in the previous month. However, over the weekend period, there was a noticeable increase of +4.6% in September compared with a decline of -3.8% in the month before – this is a trend we typically see post the summer holidays and the great return to school.

The final week of September bought some positive news for retailers as footfall rose across all three destination types rising by +4.2% from the week before. This is a welcome result for stores and destinations, and was undoubtedly helped by the mild weather, although with a similar pattern over the same two weeks in 2022 it suggests a strong seasonal factor is coming into play. The stand out winner was high streets where there had been a drop in footfall in the week before which had driven the overall decline, versus modest rises in retail parks and shopping centres.

For this last week in the month, footfall rose on six of the seven days, although overall weekly performance for retail will have been constrained by a lacklustre performance on Saturday. Footfall declined marginally on Saturday versus rises on the other six days. This was largely due to a strong comparable in the week before last when it was the best performing day of the week. Not only is Saturday still the peak trading day of the week, but hybrid working means that it is also gaining in importance as fewer consumers spend less time in their offices over the five days from Monday to Friday.

Despite the weakening performance in September, there is some assurance for retail destinations when comparing against the 2019 level as the gap narrowed marginally to -10.9% from -11% in August but this modest improvement was heavily influenced by activity in high streets as the gap from 2019 narrowed to -12.8% from -13.4% in August. The most notable change occurred in shopping centres and retail parks, as the gap from the 2019 level widened to -15.2% and -2.3% respectively.

Looking ahead, the declining trend in footfall across UK retail destinations is likely to continue into October as the start of the month will be met with rail disruption in the form of planned strikes and overtime bans which will impact businesses and retail destinations with people less likely to travel and will opt to work from home where they can. Previously MRI Software's footfall data has identified a drop in footfall on strike days of between 8% and 20% and given the widespread nature of the planned strike in the first week of October, the drop in footfall could steer towards the upper range.

James Massey, Managing Director
OnLocation for Footfall Analytics
MRI Software



Further Reading



Insight Reports: UK Monthly Commentary - August 2023

Each month MRI Software's Insights and Marketing Director, Diane Wehrle, delivers insights on retail performance for UK retail destinations. Footfall in August continued to weaken, with consumers reining in leisure trips as the cost of living crisis continues to rise.

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Webinar On Demand: Navigating the shift in footfall trends, consumer behaviour, and economic challenges

Watch our latest webinar as Diane Wehrle, Marketing & Insights Director, took a deep dive into footfall performance across UK retail destinations throughout the first half of 2023. In this session Diane analysed the continuing effect on footfall and spend in retail destinations from hybrid working and the key economic challenge from rising interest rates and inflation.

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