



Black Friday boost saved Scotland's footfall in November, with high streets seeing the best performance over the month

November was undoubtedly saved by Black Friday in terms of footfall in Scotland's high streets. Black Friday occurred in the last week of the month, with high street footfall rising in that week by +6.8% from the week before. This is in sharp contrast with a rise of just +1.7% in the previous week and +0.4% in the week before that, with both weeks being preceded by a drop of -5.4% in the first week of the month. Footfall on Black Friday itself rose across the UK by +11.7% from the week before, which was an uplift that we had forecasted, and which demonstrates that the day is now a firm fix in the annual retail calendar.

The gap from the 2019 footfall level in November in Scotland's high streets was -16.8%, narrowing from -19.4% in October and in the absence of Black Friday the gap would have continued to widened even further. Likewise, the uplift from 2021 in footfall in Scotland's high streets in November was +10% which, in the absence of Black Friday, would have also been suppressed, most likely at just circa +6%.

The gap in footfall from 2019 in November remained wider for Scotland's shopping centres than for high streets, much of which was due to a poorer performance in small to medium sized shopping centres. The response of some landlords to the lacklustre performance of smaller centres has led to them cutting back on investment. In contrast, in the face of hybrid working which has suppressed the recovery of footfall, many high streets have invested heavily in marketing and transforming themselves seasonally.

Post Black Friday we are likely to see a lull in footfall over the forthcoming weeks, which is a pattern of activity recorded by Springboard post Black Friday in pre-Covid years. There is a six day trading week in the lead up to Christmas Day this year, which suggests that footfall in the week prior to Christmas (from Sun 11th December) will also be muted, particularly as shoppers may well hold out for the last week beginning Sunday 18th December to shop in the hope of benefitting from last minute discounts.

November



October



Diane Wehrle, Marketing & Insights Director
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