2025 half-year report

Retail Rhythms

Footfall & the future of location-based commerce

Using footfall trends from H1 2025, this report helps you understand what's driving consumer behaviour and how to respond effectively.

Retail success today relies on more than just being present. It demands a deep understanding of why people visit, when they show up, and what keeps them engaged. This report takes detailed footfall data from the first half of 2025 and transforms it into practical insights for retailers, landlords and investors, navigating an increasingly dynamic landscape.

Whether you're refining your business strategy, rethinking locations or keeping pace with change, this report offers the clarity needed to make smarter decisions. Produced by PFM, it combines global trends with in-depth analysis of the UK and the Netherlands, highlighting how consumer expectations are evolving.

In summary, people are not just returning to retail spaces, they're doing so with clearer purpose and greater demands. We're seeing growth in regional shopping centres, more midday visits, and a stronger pull towards convenience, experience, and community. However, rising footfall doesn't always lead to increased sales, revealing a crucial gap between presence and purchase. Understanding this disconnect is key to aligning strategy with real consumer behaviour.

Keep reading to discover emerging retail behaviours and get actionable strategies to adapt across locations, timeframes and formats.

Ready to explore the details? Let's dive in.

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01

Global retail trends

Insights from 2025
consumer footfall data

Global footfall rises in early 2025.

The first six months of 2025 show consistent and structured growth in global footfall. January led the way with a year-on-year increase of 3.0%, supported by New Year promotions and growing consumer confidence. February and March followed with smaller gains of 1.4% and 1.3%, likely reflecting fewer key shopping triggers and a cautious economic climate.

April improved again with a 2.2% rise, fuelled by Easter spending. May (1.6%) and June (1.9%) continued this trend, helped by early summer activity and more favourable weather. Still, a notable difference appeared: while more people were returning to retail areas, in-store activity lagged in May and June. This suggests weaker conversion and more deliberate, selective shopping.

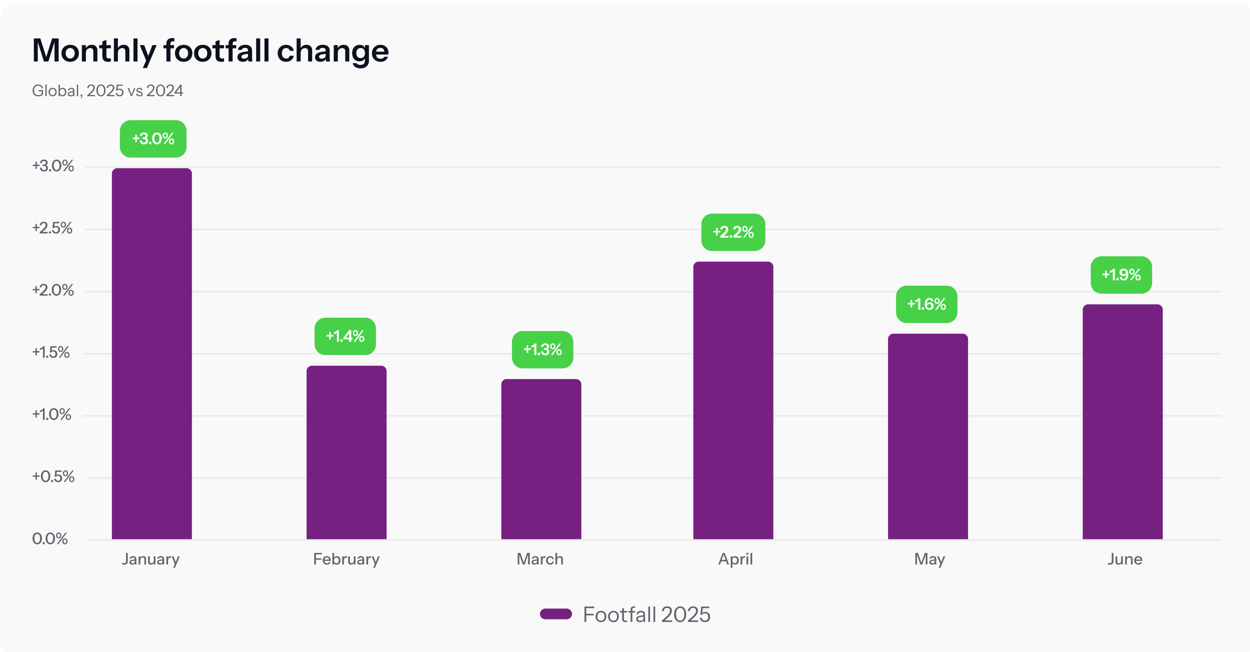

Figure 1: Monthly footfall change, global, 2025 versus 2024

Weekly footfall patterns: seasonal spikes and sudden dips

Week-by-week figures show a rhythm tied closely to the calendar. Footfall peaked in Week 3 (2.7%) and Week 13 (2.8%), reflecting post-holiday sales and Easter preparation. The largest dip occurred in Week 7, falling by 3.4%, likely due to global policy shocks including tariffs announced during Week 6 and limited engagement after Valentine's Day.

Spring holidays brought another surge, with Weeks 16 and 17 rising by 2.3% and 2.0% respectively. A short decline in Week 22 (down 1.2%) was followed by a modest recovery in Weeks 25 and 26, each up 1.6% thanks to the start of summer breaks and good weather.

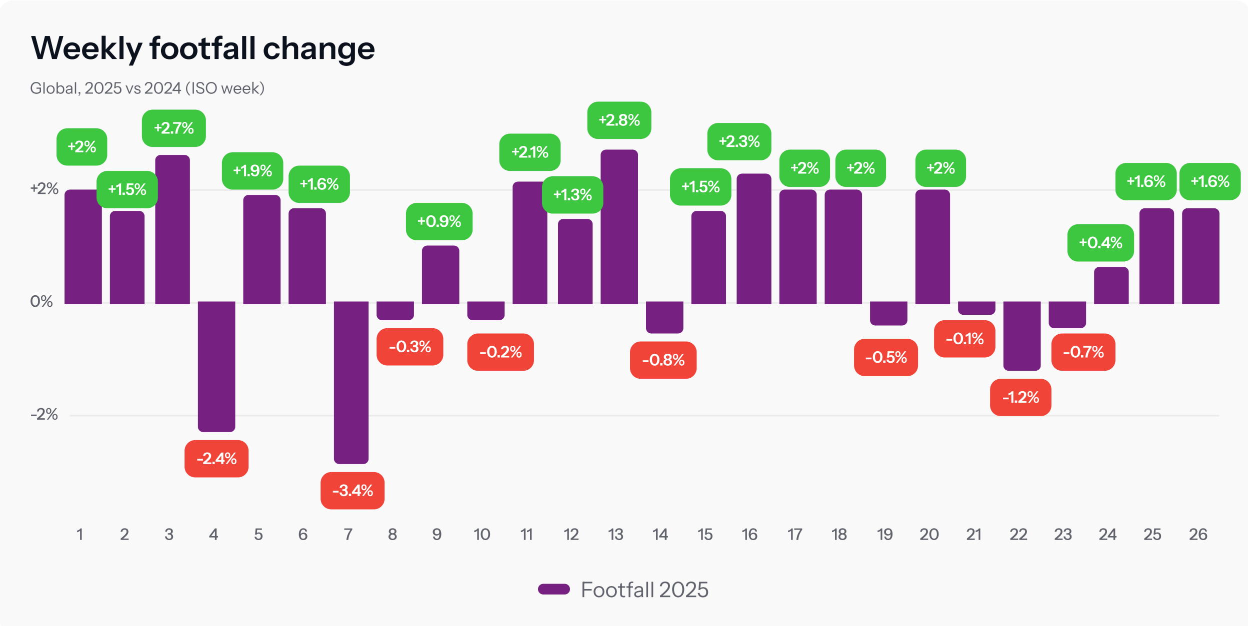

Figure 2: Weekly footfall change, global, 2025 versus 2024 (ISO week)

Timing remains stable with regional nuances

The daily rhythm of footfall is similar to last year. Visitor numbers begin building at 06:00, peak between 12:00 and 14:00, and drop sharply after 18:00.

Physical retail remains a daytime activity. While the overall pattern is consistent, there are small regional differences. For instance, peak time in the Netherlands tends to fall slightly later than in the UK.

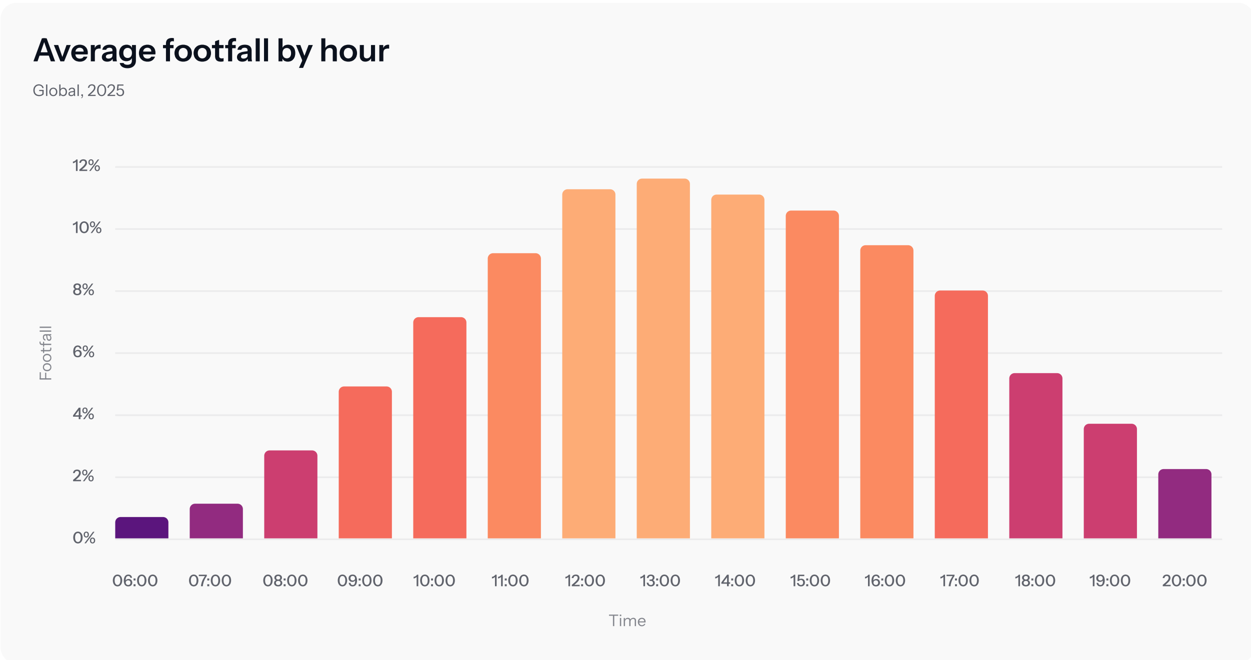

Figure 3: Average footfall per hour, global, 2025

Small but notable shifts in shopping days

One emerging trend is a subtle shift in weekday footfall distribution. Mondays saw a 0.67% relative increase over 2024, while Wednesdays and Saturdays declined slightly.

This could reflect broader behavioural changes, potentially influenced by evolving work patterns or shifting retail preferences. The modest increases on Thursdays and Fridays may indicate that shopping and leisure activities are occurring earlier in the week, perhaps as consumers adapt to new routines.

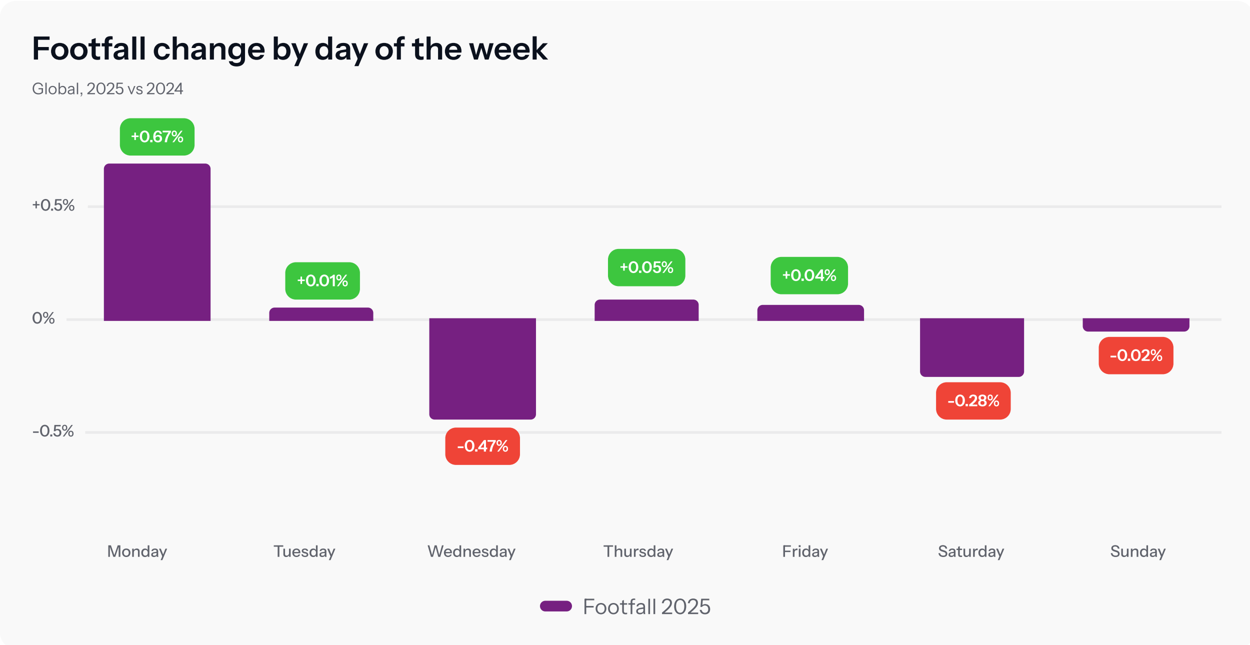

Figure 4: Footfall change by day of the week, global, 2025 versus 2024

Top 5 footfall days: timing & context matter

All of the busiest retail days so far in 2025 occurred on Saturdays and were closely tied to holidays or seasonal turning points:

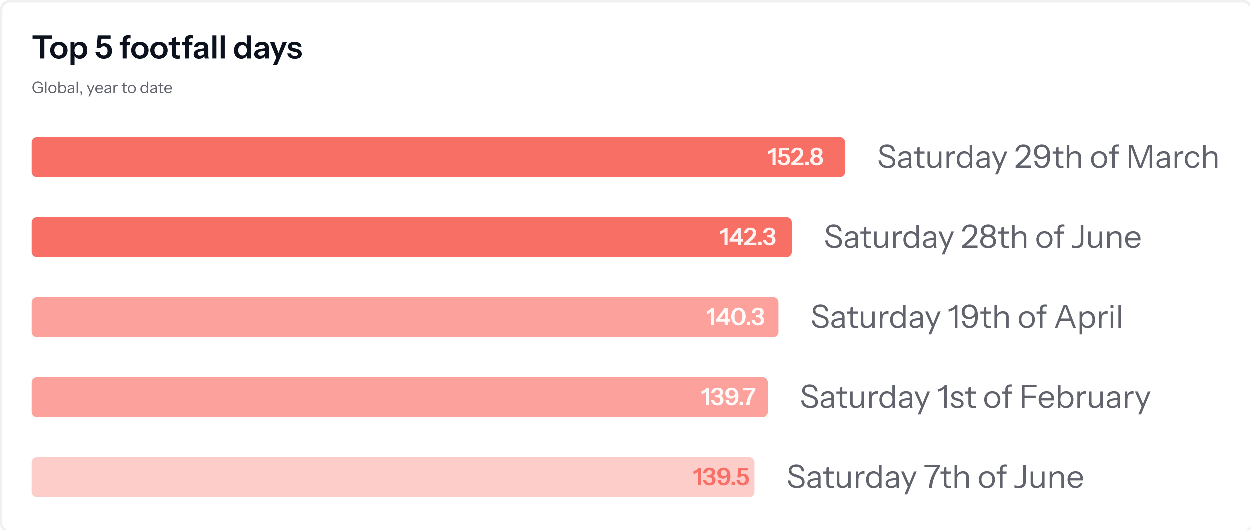

Figure 5: Top 5 footfall days, global, year to date

- Saturday, 29 March: The day before Easter, a key seasonal driver
- Saturday, 28 June: The start of summer holidays in many regions
- Saturday, 19 April: Spring break start across multiple areas
- Saturday, 1 February: Early Valentine's campaigns and new month momentum
- Saturday, 7 June: Summer weather and strong leisure engagement

These peaks show how well-timed campaigns and favourable seasonal factors can generate strong results, especially when aligned with weekends.

“People are heading out earlier in the week, a sign that changing work patterns are reshaping the traditional rhythm of footfall.”

Summary global

Unpacking the patterns that shaped H1 2025.

What stood out in the retail rhythm?

Seasonal rhythms shape weekly footfall

Footfall peaked during key calendar moments like post-holiday sales (Week 3), Easter prep (Week 13), and spring holidays (Weeks 16–17). The sharpest drop came in Week 7 (–3.4%) after global policy disruptions.

Summer brings modest recovery

After a dip in Week 22, summer holidays and favourable weather boosted recovery in Weeks 25 and 26, each rising by 1.6%.

Midday remains the global peak

Footfall consistently peaks between 12:00–14:00 across regions. Physical retail remains a daytime activity, with minor local variations in timing.

Weekday habits are shifting

Monday footfall rose by 0.67% over 2024, while Wednesdays and Saturdays saw declines. Thursday and Friday activity is slightly increasing, pointing to evolving work–life patterns.

Top trading days tied to season and timing

All top 5 footfall days were Saturdays, driven by seasonal campaigns, holidays, and early-month momentum. Timing and context remain critical for success.

Behaviour is predictable, but precision matters

While overall patterns remain stable, winning retail strategies align closely with timing, relevance, and well-targeted seasonal execution.

Volume may rise, but value lies in purpose.

What can we expect in H2 2025?

Solid summer performance, led by value and experience

Footfall consistently peaks between 12:00–14:00 across regions. Physical retail remains a daytime activity, with minor local variations in timing.

Footfall ≠ in-store visits

Traffic may grow, but in-store engagement is lagging. Shoppers are more purposeful, with fewer but more intentional visits.

Autumn dip followed by recovery

September may see a slight slowdown, but back-to-school promotions and early holiday planning should lift momentum in October.

Q4 peaks with flexible shopping patterns

Year-end will drive the highest volumes, but expect more weekday and off-peak visits due to hybrid work and spontaneous behaviour.

Winning formats: covered and mixed-use

Destinations offering weather protection, food, leisure and events will outperform standalone or open-air formats.

Operational focus: Mondays and mid-days

Traffic is growing most on Mondays and during 12:00–14:00. Retailers should align staffing and promotions with these new peaks.

02

The Netherlands

In-depth analysis of 2025's footfall data & trends

Dutch footfall trends: a steady start with seasonal sensitivity.

The Dutch retail sector recorded consistent growth in footfall during the first half of 2025, suggesting a renewed sense of consumer engagement. January showed the strongest year-on-year rise at 4.4%, driven by post-holiday promotions, winter leisure outings, and a broader return to mobility. February followed with a 3.1% increase, supported by Valentine's Day marketing and the school holiday calendar. March saw growth moderate to 1.9% but remained positive, indicating stable retail activity despite lingering winter conditions.

In April, footfall picked up again to 2.5%, helped by Easter shopping and King's Day preparations. May recorded the smallest increase at 1.2%, likely affected by fragmented holidays and unstable spring weather. By June, the upward trend resumed, with footfall rising by 2.6%, driven by early summer planning and warmer conditions.

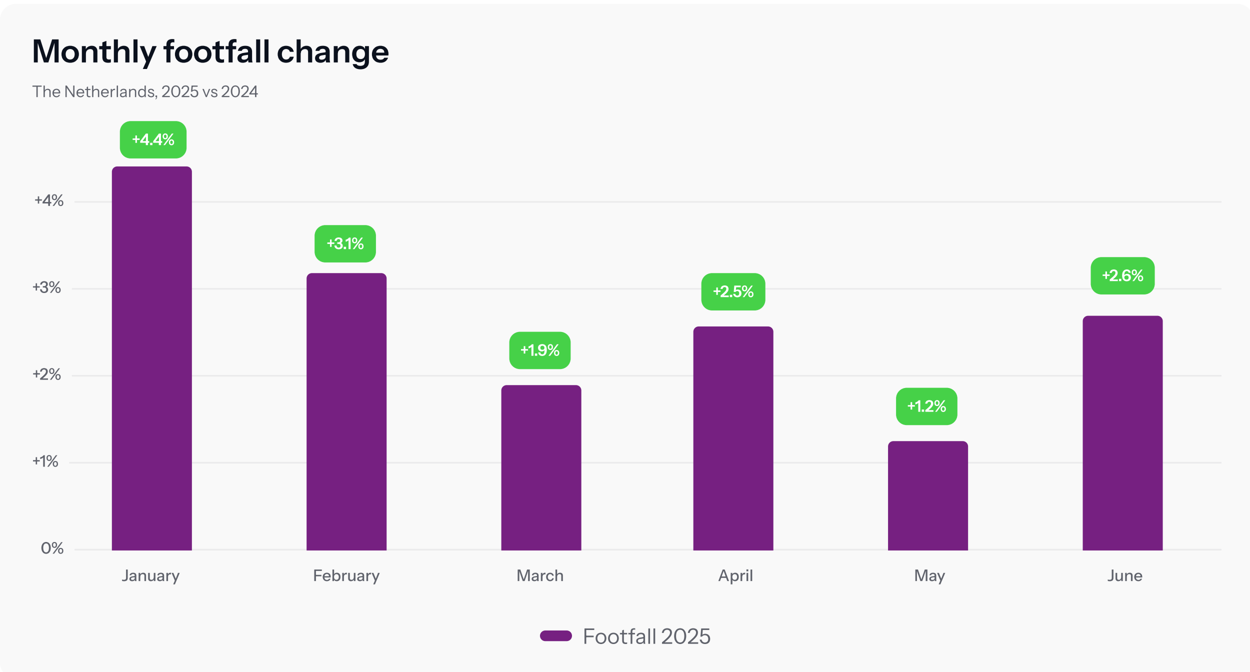

Figure 6: Monthly footfall change in the Netherlands, 2025 versus 2024

Week-by-week developments: peaks and dips

Weekly data gives a more detailed view of footfall performance. The first three weeks of 2025 delivered strong growth, ranging from 2.8% to 3.2%. A sharp drop followed in Week 4 (down 2.4%), potentially caused by cold weather or reduced activity after early-year sales. Weeks 5 and 6 saw immediate rebounds of 3.8% and 3.7% respectively, likely boosted by winter promotions and school holidays.

Between Weeks 10 and 14, momentum built steadily, with Week 13 reaching the highest increase of the period at 4.8%. This reflects elevated activity in the run-up to Easter. From Week 19, footfall declined over four consecutive weeks, reaching lows of 3.7% in Week 19 and Week 22. This period of weaker performance was likely influenced by midweek public holidays and inconsistent weather patterns. A slow recovery began in Weeks 25 and 26, with modest growth of 1.0% and 2.3%, pointing to renewed energy as summer approached.

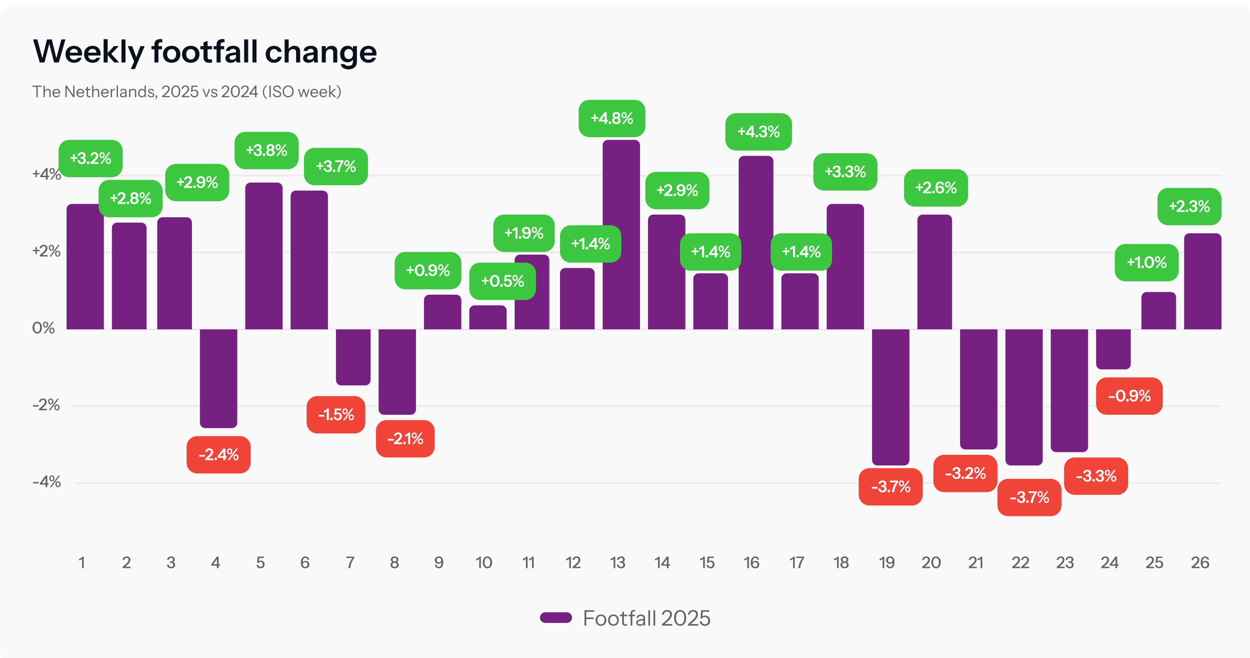

Figure 7: Weekly footfall change in the Netherlands 2025 versus 2024 (ISO week)

Top 5 footfall days: holiday momentum & seasonal campaigns

The busiest day in Dutch retail during the first half of the year was Saturday 29 March, which scored an index of 152.9. This day marked the weekend before Easter, a consistently strong moment for both leisure and functional shopping, coinciding with the start of the spring school holidays in several regions.

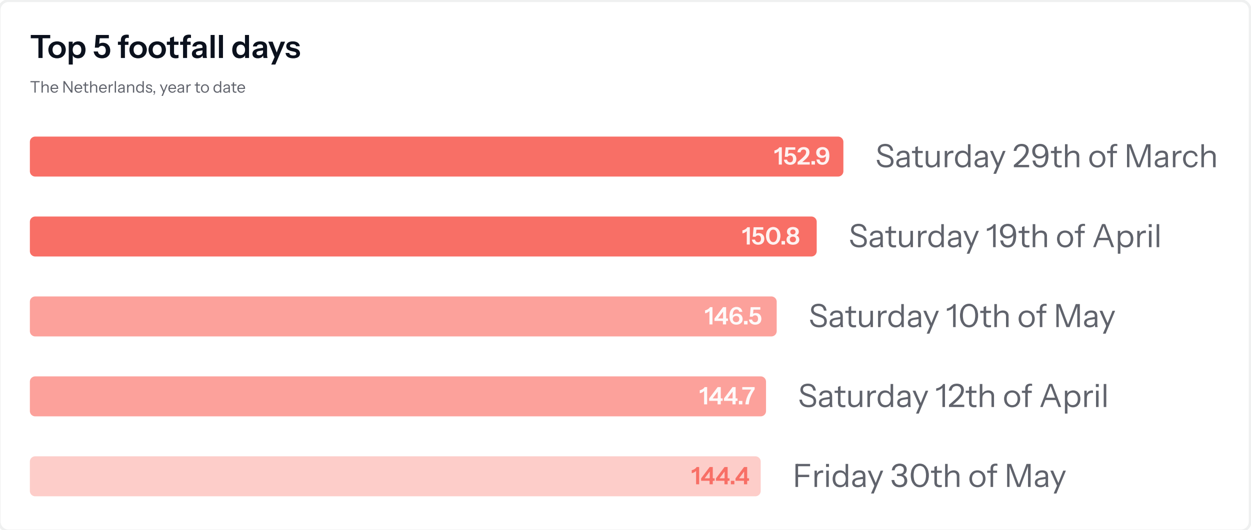

Figure 8: Top 5 footfall days in the Netherlands, year to date

Other high-traffic days included:

- Saturday 19 April: Just ahead of King's Day, fuelled by spring energy and pre-holiday preparation
- Saturday 10 May: The lead-up to Mother's Day, traditionally a peak moment for gift-related shopping
- Saturday 12 April: Mid-spring, with improving weather and growing holiday anticipation
- Friday 30 May: Boosted by end-of-month pay and the long Ascension Day weekend, which encouraged extended shopping activity

These dates confirm that Dutch retail peaks are driven by cultural and seasonal rhythms, with surrounding periods often outperforming the public holidays themselves. Retailers that plan promotions and events around these peak windows are best placed to capture attention and increase conversion.

Regional shifts: growth extends beyond the big four

In contrast to 2024, when the Randstad dominated footfall growth, 2025 is seeing a more balanced spread across the country. Secondary cities outside the Randstad reported a year-on-year increase of 3.2%, compared to 2.0% in the core urban regions.

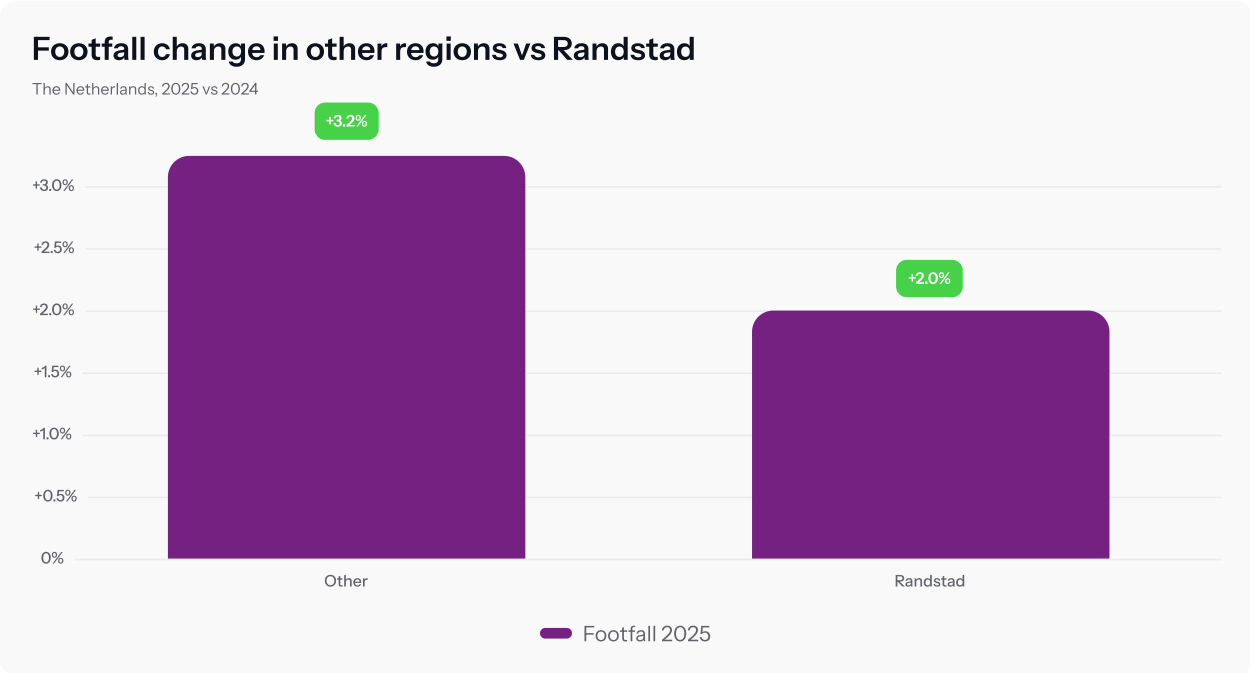

Figure 9: Footfall change in other regions and Randstad, 2025 versus 2024

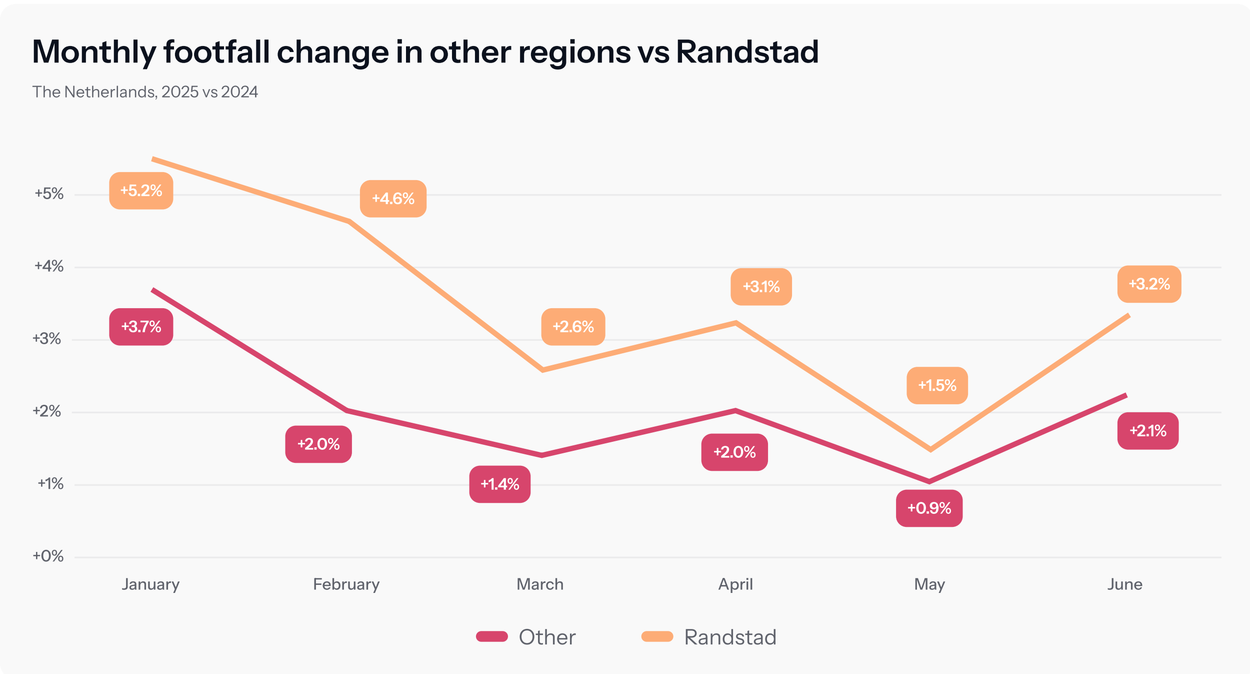

Figure 10: Monthly footfall change in other regions and Randstad, 2025 versus 2024

This pattern is also seen when comparing the Big Four (Amsterdam, Rotterdam, The Hague and Utrecht) to other Dutch cities. Non-Big Four cities experienced growth of 3.0%, while the larger urban areas rose by just 1.4%. Although the big cities still record the highest absolute footfall, their growth appears to be levelling off. This could indicate a temporary plateau or a shift in momentum towards more mid-sized regional markets.

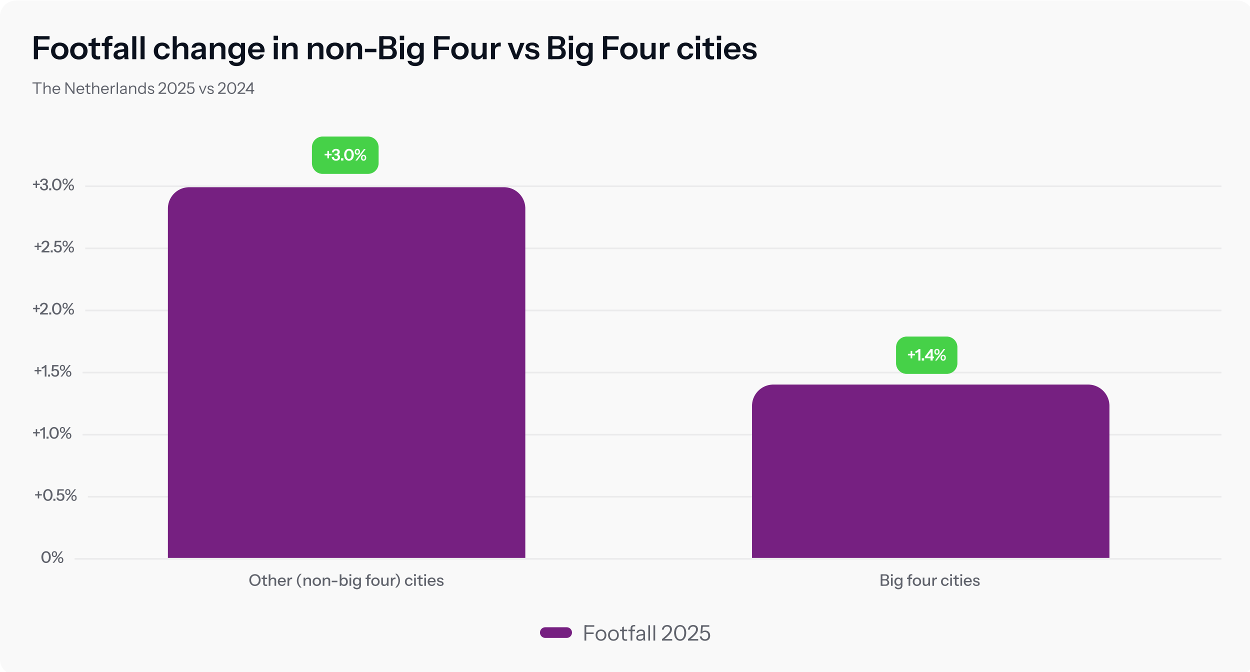

Figure 11: Footfall change in non-Big Four and Big Four Dutch cities, 2025 versus 2024

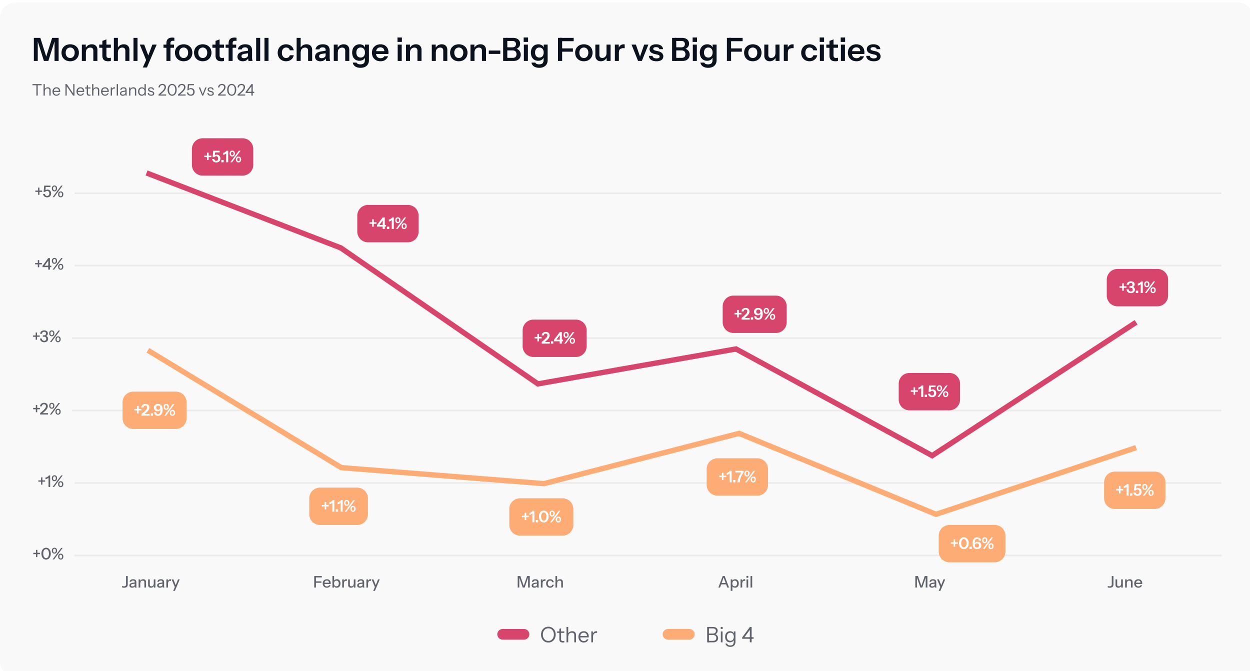

Figure 12: Monthly footfall change in non-Big Four and Big Four Dutch cities, 2025 versus 2024

Weekday & weekend trends: volume still high, growth is shifting

Although weekends remain the busiest period in absolute terms, recent figures show a change in growth patterns. Monday footfall rose the most on a year-on-year basis, increasing by 0.51%. Sunday and Friday also recorded growth of 0.22% and 0.16% respectively. These gains suggest that flexible work schedules and hybrid routines are encouraging shopping outside of the traditional weekend peak.

In contrast, Wednesdays and Saturdays saw notable declines, down 0.54% and 0.34% respectively. Tuesdays remained flat at minus 0.06%, while Thursdays held steady with a 0.06% increase. Although Saturday remains the top-performing day overall, these figures highlight a slow rebalancing of footfall across the week.

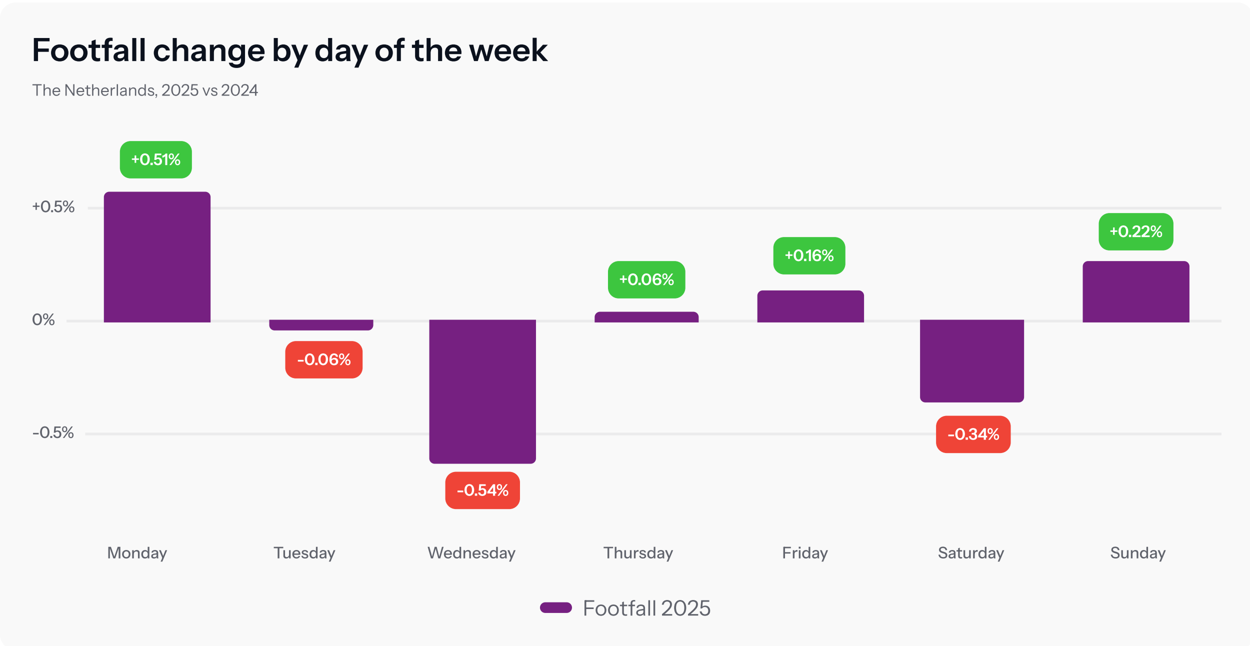

Figure 13: Footfall change by day of the week in the Netherlands, 2025 versus 2024

Peak timing: Dutch shoppers prefer later visits

Compared to global averages, the Netherlands continues to show a slightly later peak in daily visits. Footfall typically reaches its highest point at 2 PM, rather than 1 PM. This pattern has held steady since the previous report. Shoppers in the Netherlands tend to follow familiar routines, with behavioural shifts occurring gradually over time.

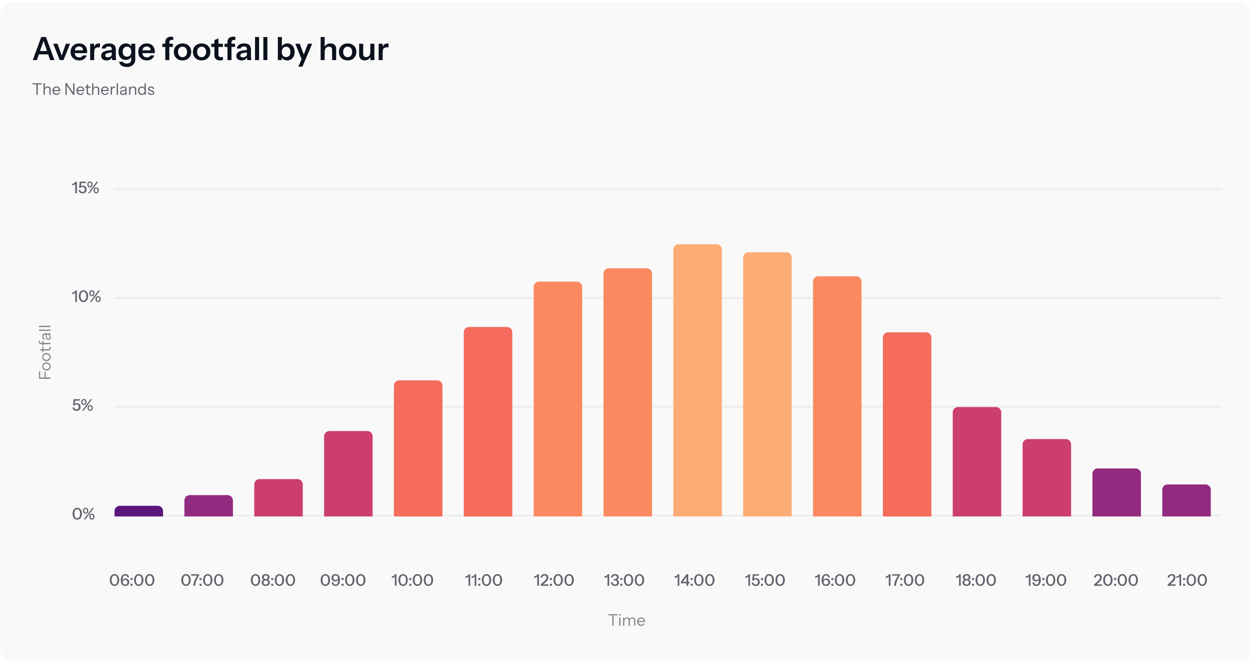

Figure 14: Average footfall per hour in the Netherlands

Weather matters: conditions influence behaviour

Footfall performance in the Netherlands closely followed the country's changing weather during the first half of 2025. Periods of mild, dry weather around key events supported stronger retail activity, while colder or wetter weeks led to softer numbers. Locations with indoor offerings, flexible layouts, or strong seasonal programming were better equipped to absorb these shifts and retain footfall during unfavourable weather.

Spotlights on shopping centres

A closer look at over 250 Dutch shopping centres shows a division into three key types:

Run centres

Smaller neighbourhood centres focused on daily essentials

Fun centres

Recreational and inner-city destinations

Frun centres

Larger local and district-level centres offering a mix of uses

PFM's managed portfolio is split accordingly: 32% Run, 24% Fun, and 44% Frun. Frun centres lead as hybrid formats gain traction.

Centre performance and visit timing

Among the three types, Frun centres recorded the highest footfall growth at 3.2%, followed by Run centres at 2.7% and Fun centres at 2.1%. Frun and Run centres continue to benefit from regular footfall linked to everyday needs and broad catchment areas. Fun centres, which are more reliant on events and leisure experiences, showed a flatter trend.

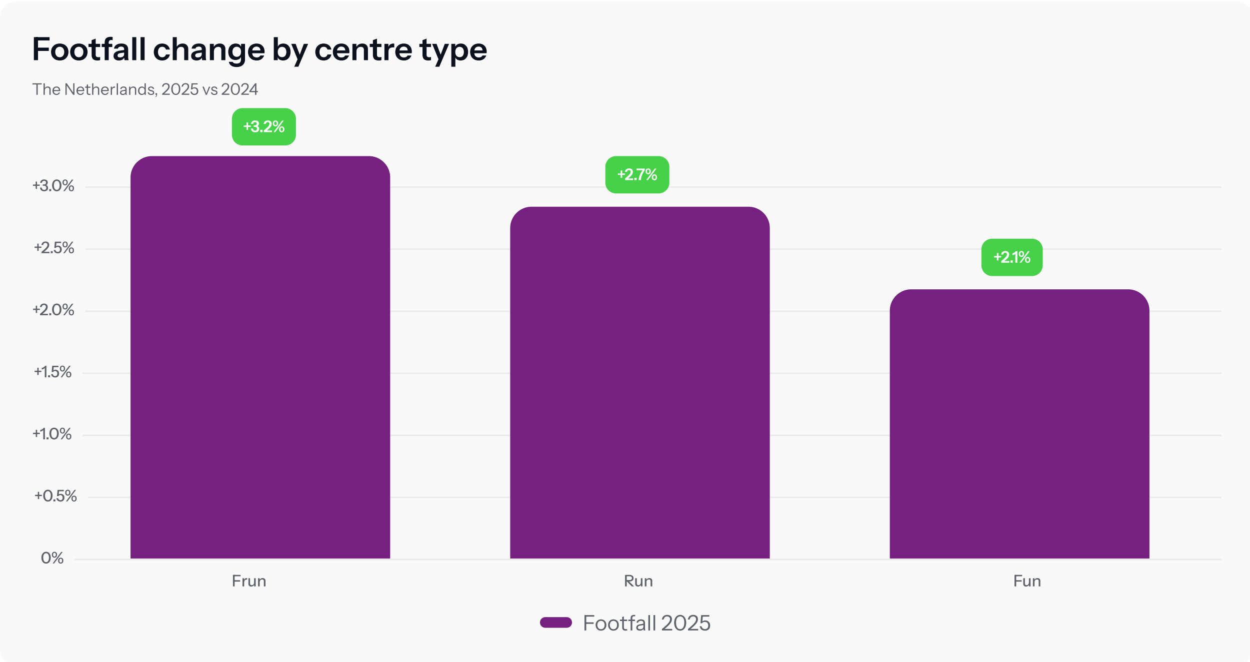

Figure 15: Footfall change by centre type in the Netherlands, 2025 versus 2024

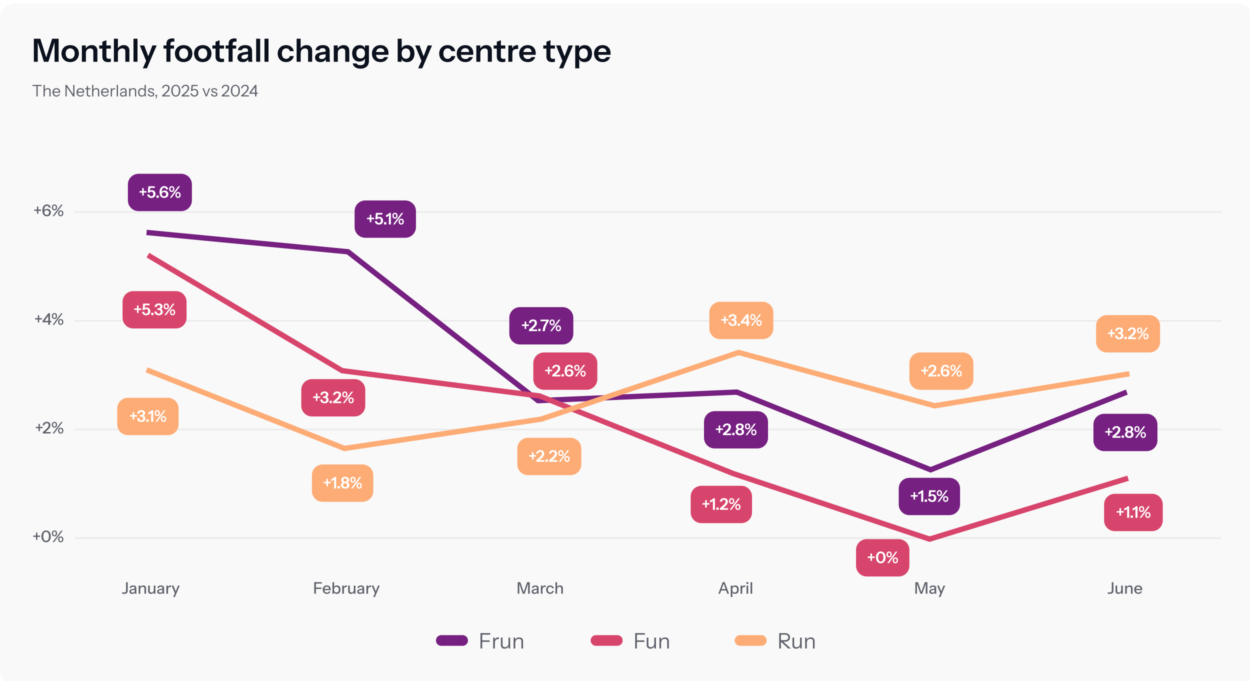

Figure 16: Footfall change in the Netherlands 2025 versus 2024

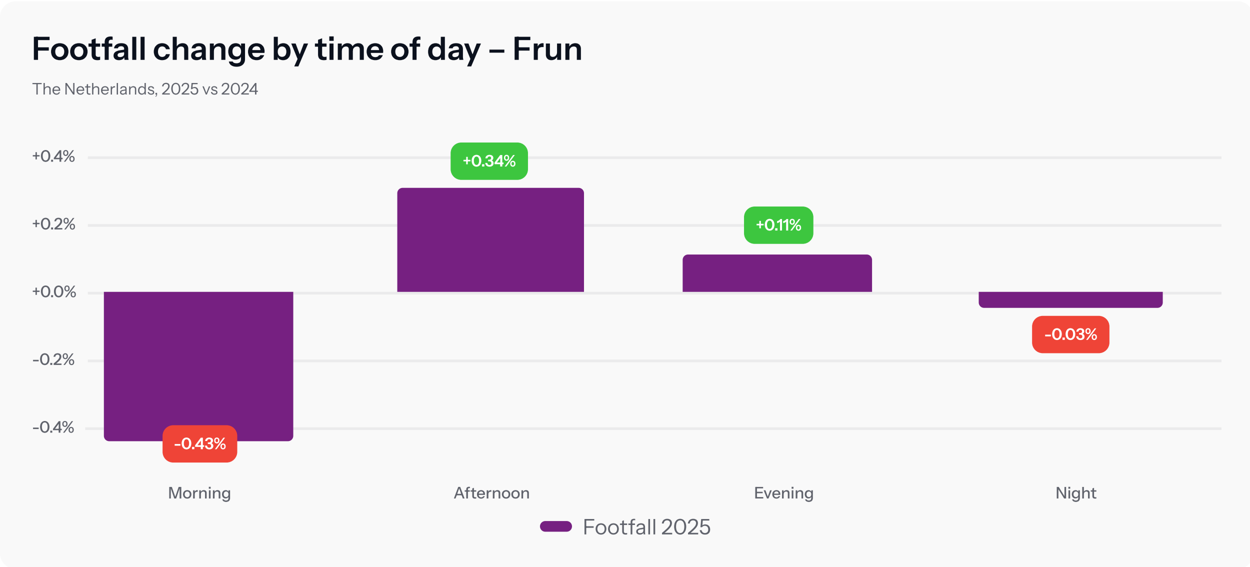

Figure 17: Footfall change by time of day – Frun, the Netherlands, 2025 versus 2024

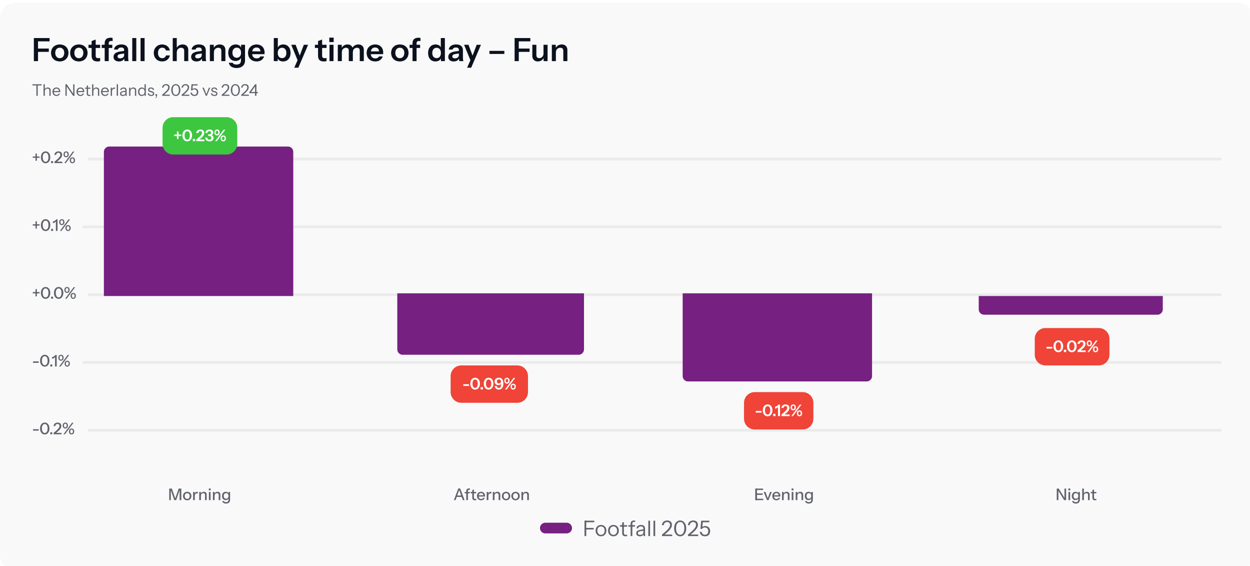

Figure 18: Footfall change by time of day – Fun, the Netherlands, 2025 versus 2024

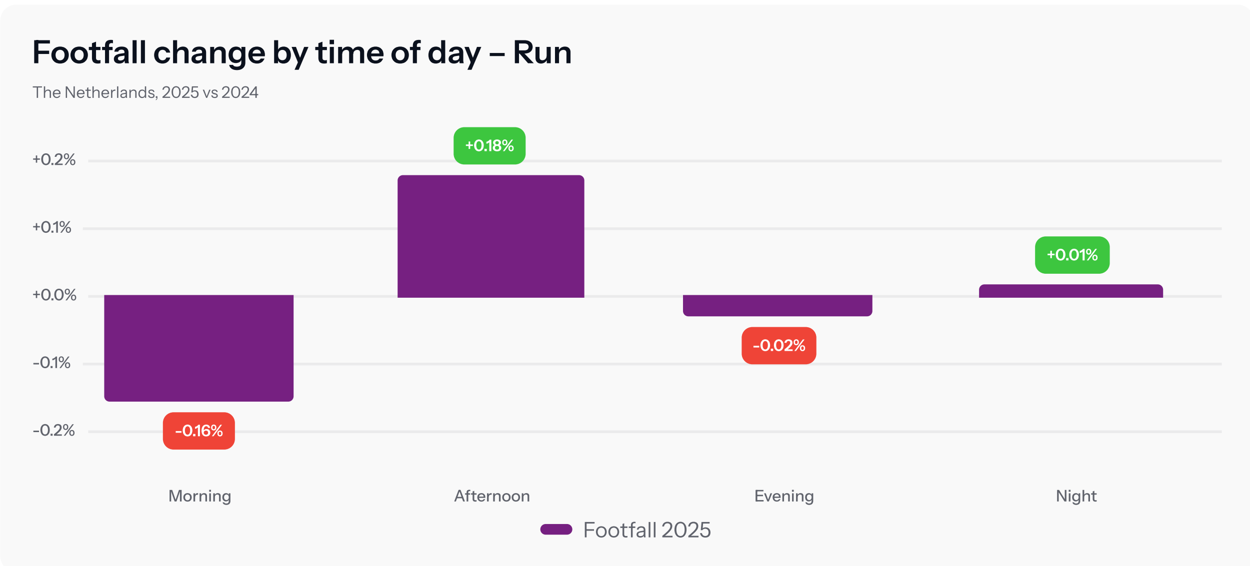

Figure 19: Footfall change by time of day – Run, the Netherlands, 2025 versus 2024

More visitors does not always mean more sales

The data shows that while footfall and turnover often move in the same direction, the relationship is not always consistent. Some months saw increased turnover despite lower visitor numbers, indicating higher spending per visit or more focused trips. In other periods, rising footfall did not translate into sales, pointing to reduced conversion or smaller average purchases.

Although footfall is a valuable measure in performance analysis, it is not the only factor in the equation. The quality of visits and how well retailers meet the needs of these visitors are just as important.

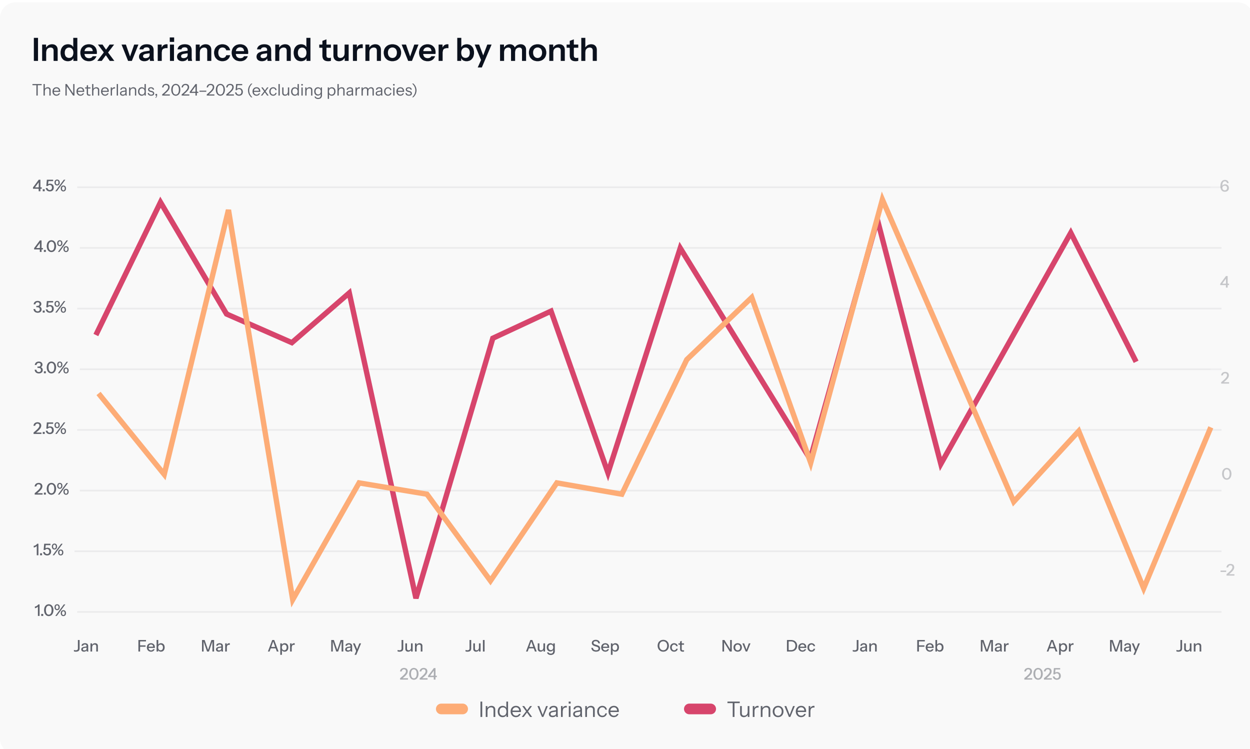

Figure 20: Index variance and turnover by month in the Netherlands, 2024–2025 (excluding pharmacies)

Willing to walk, less willing to spend

This chart compares changes in the footfall index with consumer willingness to buy. While footfall remained relatively stable in the first half of 2025, willingness to buy fell sharply, from around minus 10 in January to nearly minus 20 by May and June.

The widening gap between physical visits and purchasing intent highlights growing pressure on household budgets. People are still visiting shops, but they are more cautious with their spending. This points to a shift in behaviour where presence does not guarantee purchase. For retailers, it signals the importance of sharpening value perception, pricing strategies, and targeted engagement. Simply increasing footfall is no longer enough to drive sales.

Figure 21: Index variance and willingness to buy by month in the Netherlands, 2024–2025

"High footfall doesn’t guarantee high turnover. Understanding visitor intent is key."

Summary The Netherlands

How Dutch retail moved in H1 2025.

What stood out in the retail rhythm?

Strong start, but momentum varied

Footfall rose sharply in January (+4.4%) and remained positive through spring, though growth dipped in May due to holidays and poor weather.

Afternoons dominate visit timing

Most visits occurred around midday, especially in Frun and Run centres. Fun centres remained strong in the morning but saw afternoon dips.

Event-driven peaks and weekend strength

Key dates like Easter, King's Day and Mother's Day boosted traffic. Saturdays remained the top-performing days across all formats.

Frun centres lead by format

Growth was highest in Frun centres (+3.2%), followed by Run (+2.7%) and Fun (+2.1%) formats. Event reliance made Fun centres less stable.

Secondary cities outperform major hubs

Regional centres outpaced the Randstad and Big Four cities, especially during spring, driven by local engagement and accessibility.

Traffic up, but conversion lagging

Despite higher visitor numbers, spending didn't keep pace. Retailers must focus on converting footfall into actual sales.

Weekday patterns shift towards weekends

Midweek footfall declined—Wednesdays fell by 0.54%—while Fridays and Sundays gained, signalling a shift to weekend-led retail habits.

H2 2025 Retail Forecast - The Netherlands

Turning presence into performance.

What can we expect in H2 2025?

Stable growth with regional resilience

The Dutch retail sector is expected to remain steady in H2 2025, supported by consumer confidence and local strength.

Summer: leisure-led areas take the lead

Coastal towns, outlets and family destinations will benefit most from school holidays and tourism. Frun centres will remain stable. Absolute numbers however in Dutch retail landscape will be lower in all locations, except for the real tourist places.

Autumn: opportunity for repositioning

While not peak months, September and October offer chances to reset marketing, refresh tenant mix and build towards Q4.

Q4: cultural and commercial high points

Black Friday, Sinterklaas and Christmas will drive the year's highest volumes, especially for gifting and family-driven formats.

Experience drives performance

Campaigns that mix emotion, relevance and local resonance will outperform pure discounting. Activation will matter more than price.

Timing matters: focus on late-week and midday

Flexible working is pushing footfall into weekday and midday slots. Operations should adapt to this shift in rhythm.

03

The United Kingdom

In-depth analysis of 2025's
footfall data & trends

UK Footfall steadies with spring momentum.

Retail footfall in the United Kingdom showed modest but encouraging signs of recovery in the first half of 2025. January opened with a mild year-on-year increase of 0.3%, indicating a measured return to high streets after the festive season. February followed with a slightly stronger rise of 0.4%, supported by improved weather and more positive consumer sentiment.

March marked a turning point with a 1.4% increase, aided by milder conditions and early Easter activity. April dipped by 0.8%, affected by cooler temperatures, school holiday timing, and the early Easter placement, which spread visits over a wider period. Momentum returned in May with a gain of 0.8% and remained steady in June, also at 0.8%, with footfall supported by seasonal shopping and public holidays. The overall trend points to a retail environment gaining in stability and confidence, even as spending remains cautious.

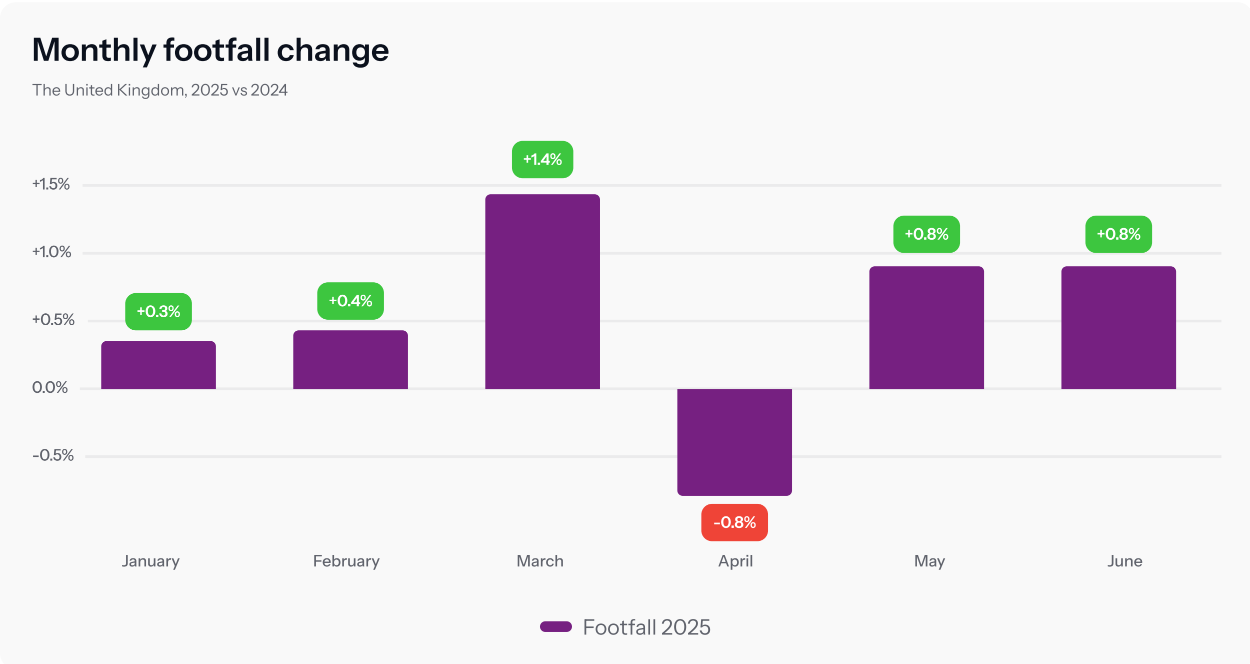

Figure 22: Monthly footfall change in the United Kingdom, 2025 versus 2024

Weekly patterns reflect external pressures & holiday effects

The weekly footfall data highlights short-term volatility early in the year. Week 4 saw a decline of 1.8%, followed by a sharper drop of 5.0% in week 7, driven by heavy rain and major transport disruptions that limited access to city centres.

From week 10 onwards, footfall began to recover, helped by the lead-up to Easter and more favourable travel conditions. Week 11 reached a high of 3.7%, supported by warmer weather and well-timed retail promotions. The recovery continued into spring, with week 21 showing a 2.9% increase, reflecting the effectiveness of national campaigns and synchronised public events in driving renewed footfall.

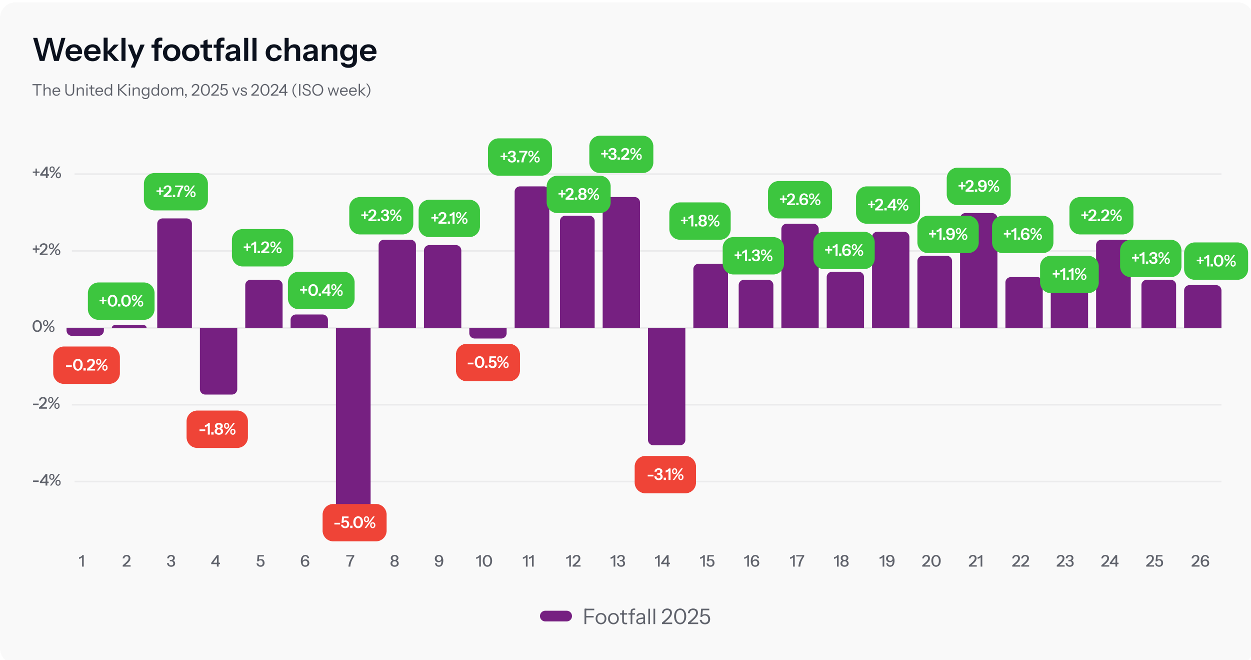

Figure 23: Weekly footfall change in the United Kingdom, 2025 versus 2024 (ISO week)

Peak days align with seasonal and cultural events

Saturday, 9 March recorded the highest footfall in the UK during the first half of 2025, with an index of 145.0. This coincided with the start of spring trading and the lead-in to Mother's Day, traditionally one of the busiest weekends in the UK retail calendar.

Saturday, 29 June followed closely at 142.8, benefitting from improving summer weather and early clearance sales ahead of the school holidays. Saturday, 27 April also performed strongly at 140.7, landing just before the early May bank holiday. Retailers maximised this period with extended hours and outdoor-focused offers.

Saturday, 15 June (138.8) reflected momentum leading into Father's Day, while Saturday, 27 January (138.7) likely captured the first post-payday boost after a quiet start to the year. Together, these dates underline the continued importance of combining seasonal relevance with timely activations to maximise performance.

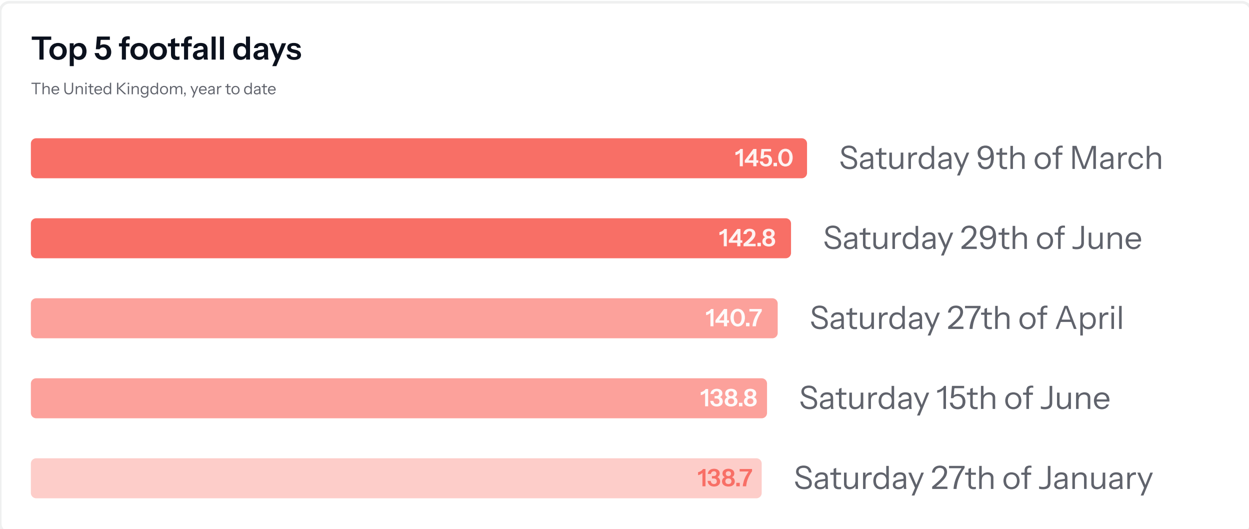

Figure 24: Top 5 footfall days in the United Kingdom, year to date

Midday peaks dominate daily footfall distribution

Footfall remained highest during the midday period, peaking between 12:00 and 13:00 when each hour accounts for nearly 12% of daily visits. Mornings start gradually around 08:00, rising sharply by late morning before tapering off after 14:00. A significant drop follows after 16:00. This concentrated activity highlights the need for retailers, particularly in urban settings, to optimise staffing and services around peak midday hours. It also suggests that lunchtime continues to serve as a key moment for purposeful, high-intent shopping.

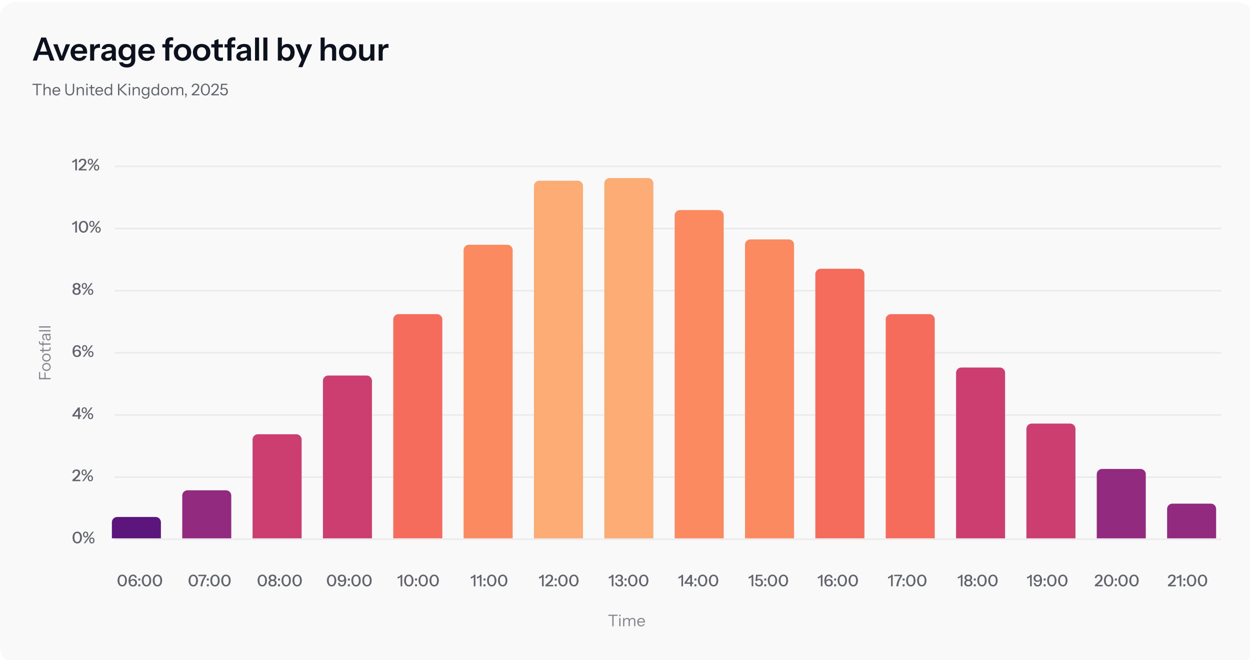

Figure 25: Average footfall per hour in the United Kingdom, 2025

Weekday shifts reflect new work rhythms

Mondays saw the strongest weekday growth, rising by 0.72% compared to the same period in 2024. This represents a reversal of earlier patterns and reflects the continued influence of flexible work schedules, where consumers now reserve the start of the week for shopping and errands.

In contrast, Saturdays fell by 0.26% and Sundays by 0.13%, suggesting that weekend visits are becoming more selective with the rebalancing of consumer behaviour. The redistribution of traffic across the week may require retailers to adapt promotional calendars and operational planning to better match new patterns of demand.

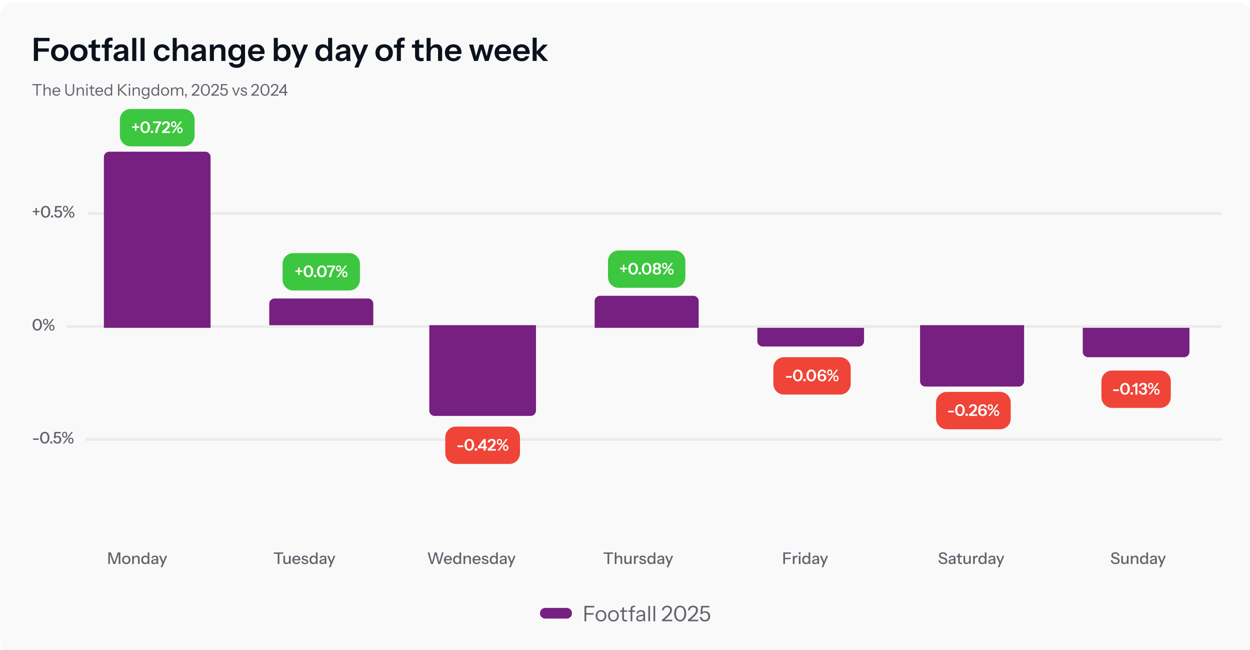

Figure 26: Footfall change by day of the week in the United Kingdom, 2025 versus 2024

Format trends show high streets in the lead

High streets and city centre locations saw the strongest growth, with footfall increasing by 3.0%. This was supported by a renewed interest in walkable, sociable retail environments and a strong appetite for midweek outings.

Shopping centres recorded a gain of 2.0%, benefitting from indoor comfort during periods of poor weather and more curated entertainment offerings. Retail parks declined slightly by 0.2%, continuing to face challenges from longer trip planning and fewer impulse visits. Markets and independent shops recorded smaller gains of 0.3% and 0.1% respectively, pointing to steady but limited footfall among niche audiences. Consumers appear to favour retail settings that combine accessibility with experience, with high streets and enclosed centres capturing the strongest engagement.

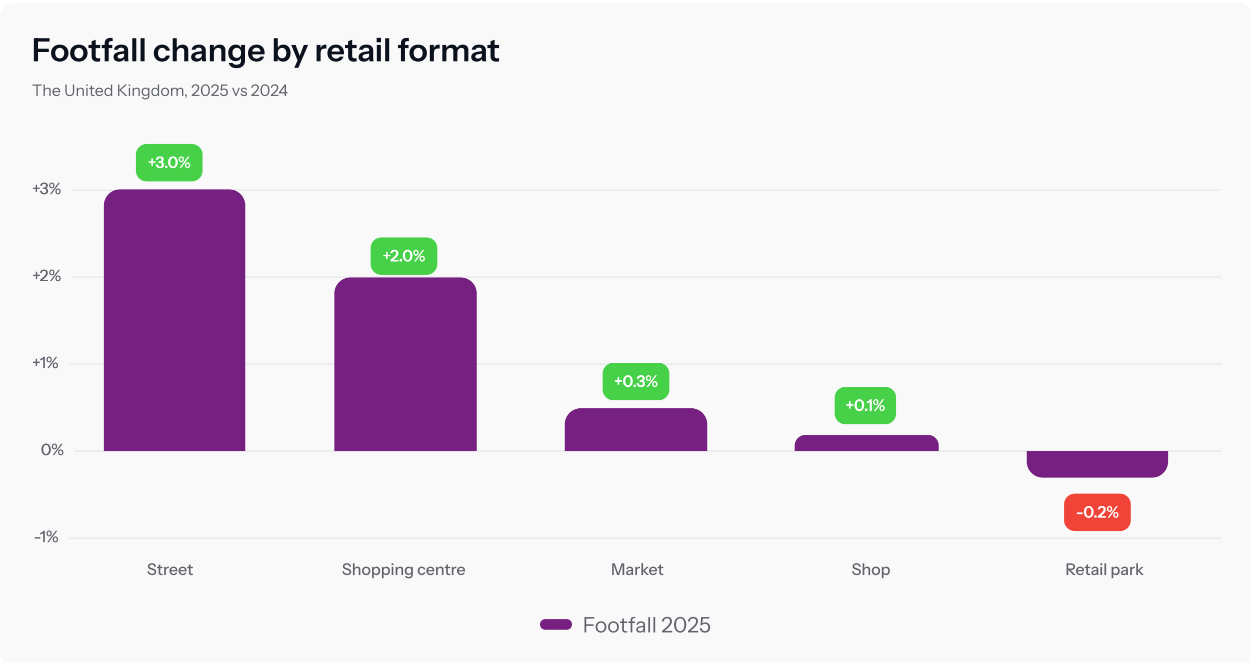

Figure 27: Footfall change by retail format in the United Kingdom, 2025 versus 2024

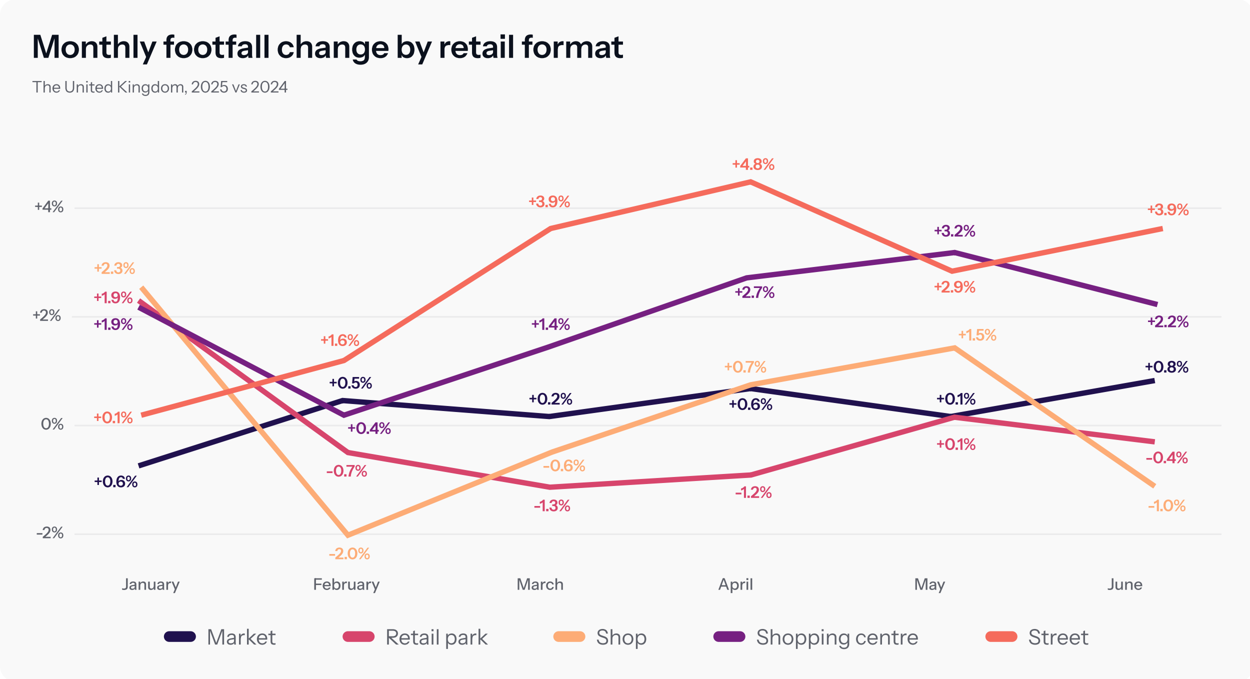

Figure 28: Monthly footfall change by retail format in the United Kingdom, 2025 versus 2024

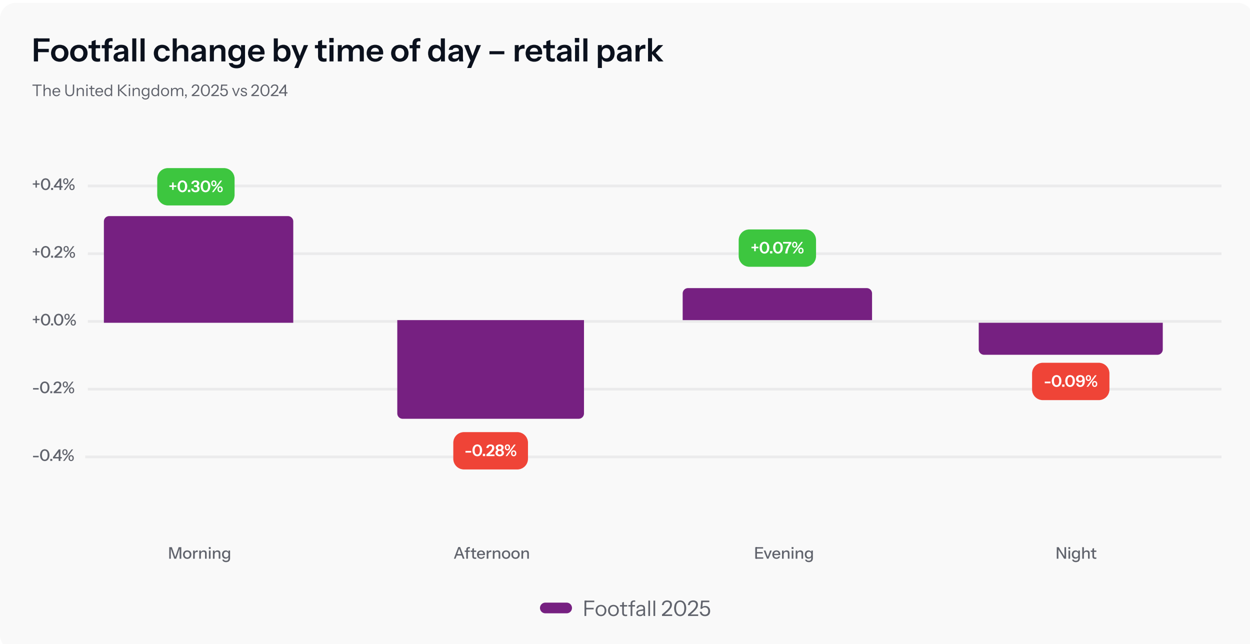

Figure 29: Footfall change by time of day in the United Kingdom retail parks, 2025 versus 2024

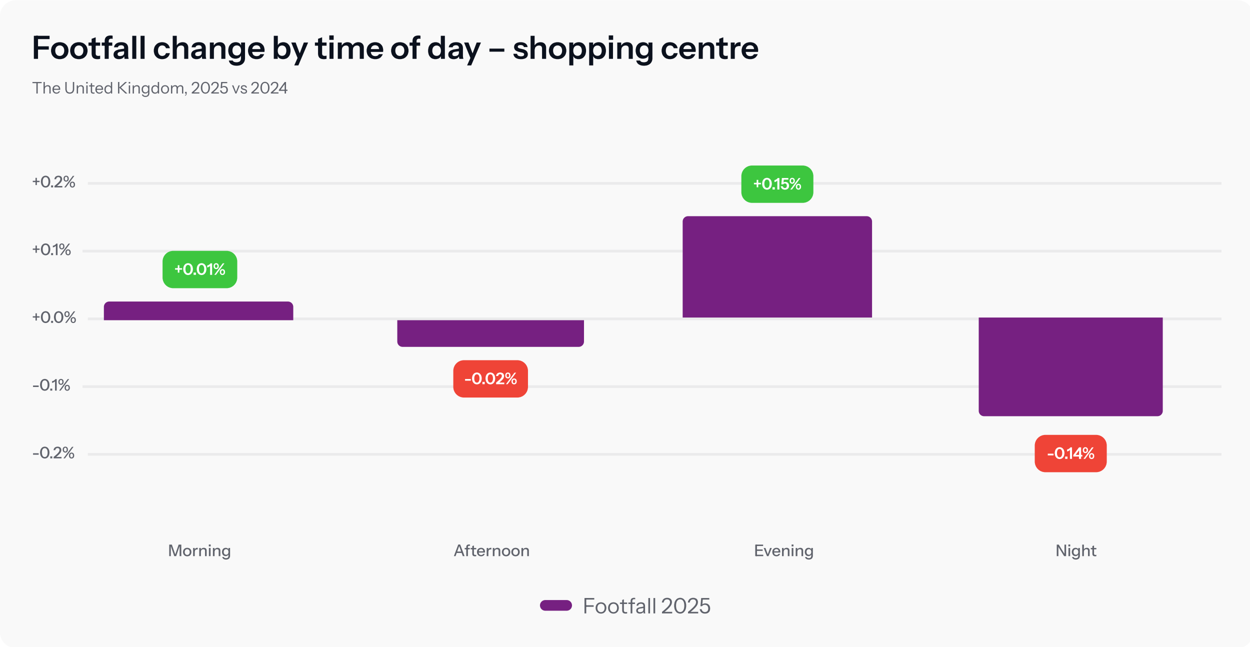

Figure 30: Footfall change by time of day in the United Kingdom shopping centres, 2025 versus 2024

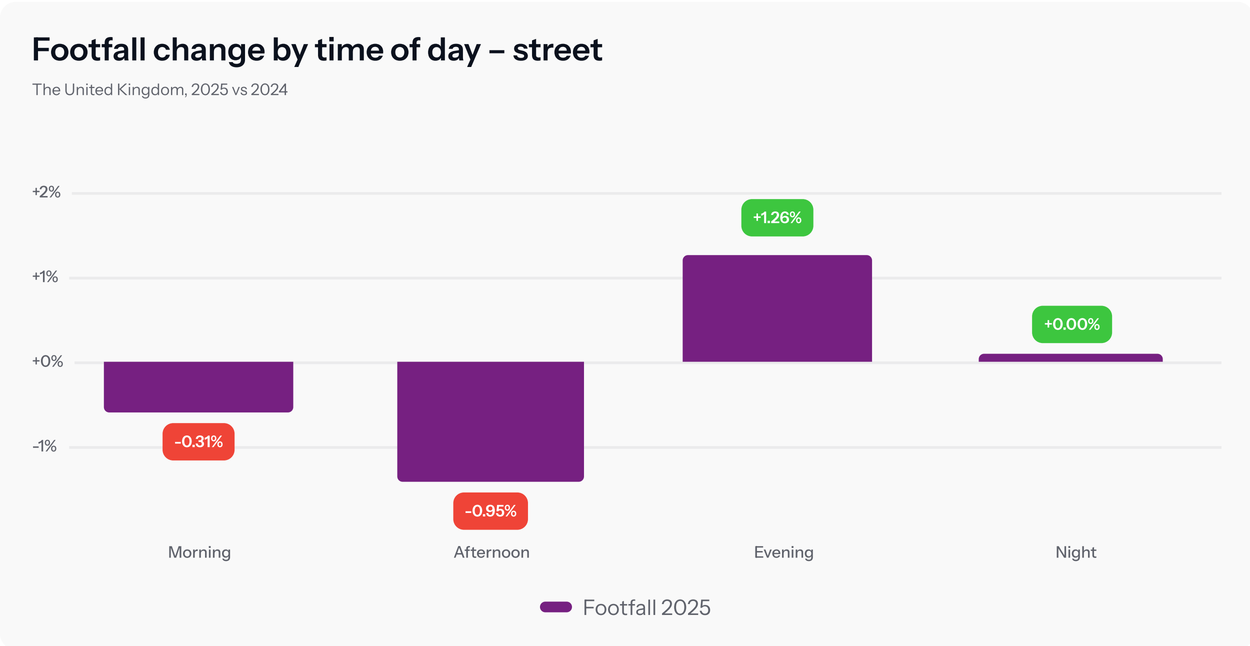

Figure 31: Footfall change by time of day in the United Kingdom streets, 2025 versus 2024

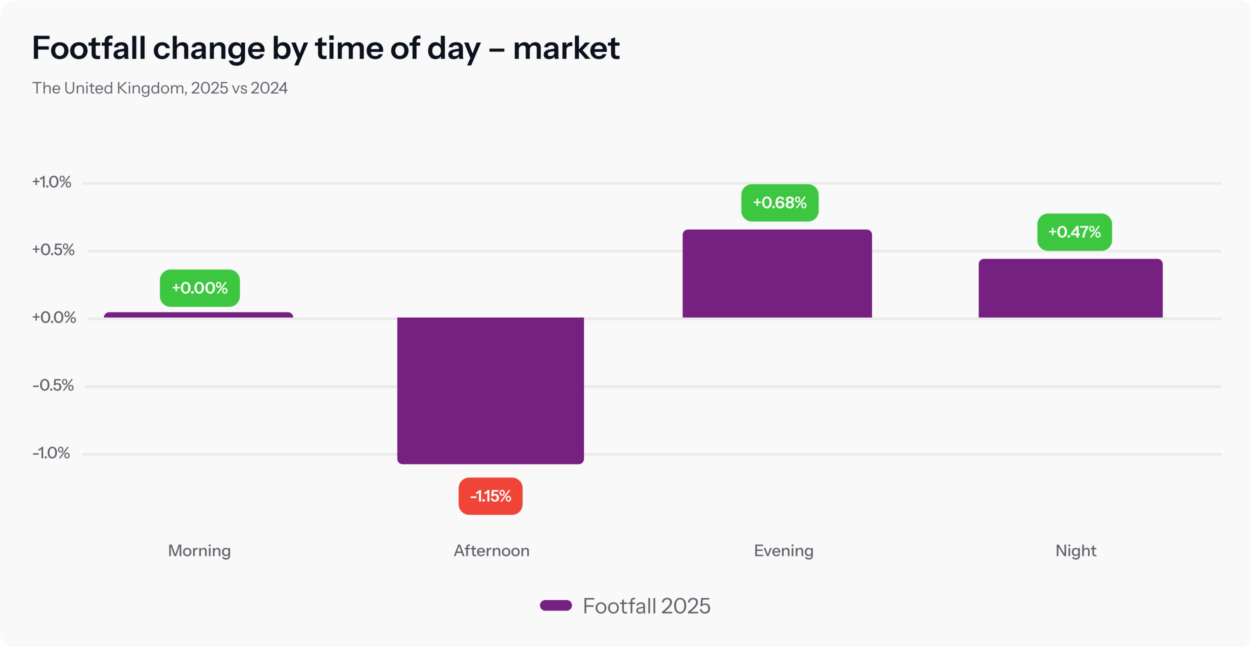

Figure 32: Footfall change by time of day in the United Kingdom markets, 2025 versus 2024

Regional momentum builds outside London

Footfall growth in London reached 0.9% year to date, while the rest of the UK posted a stronger increase of 1.5%. This shift reflects a rebalancing in favour of regional centres following London's outsized recovery in 2024.

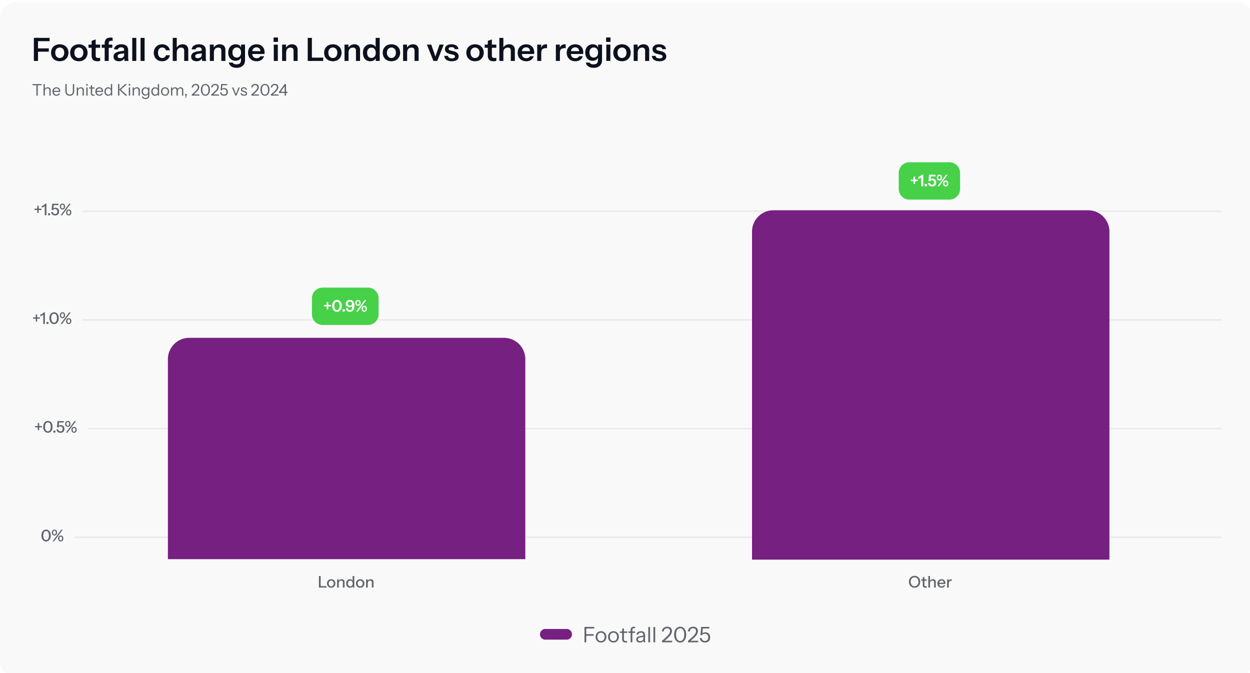

Figure 33: Footfall change in the United Kingdom, London vs other regions, 2025 versus 2024

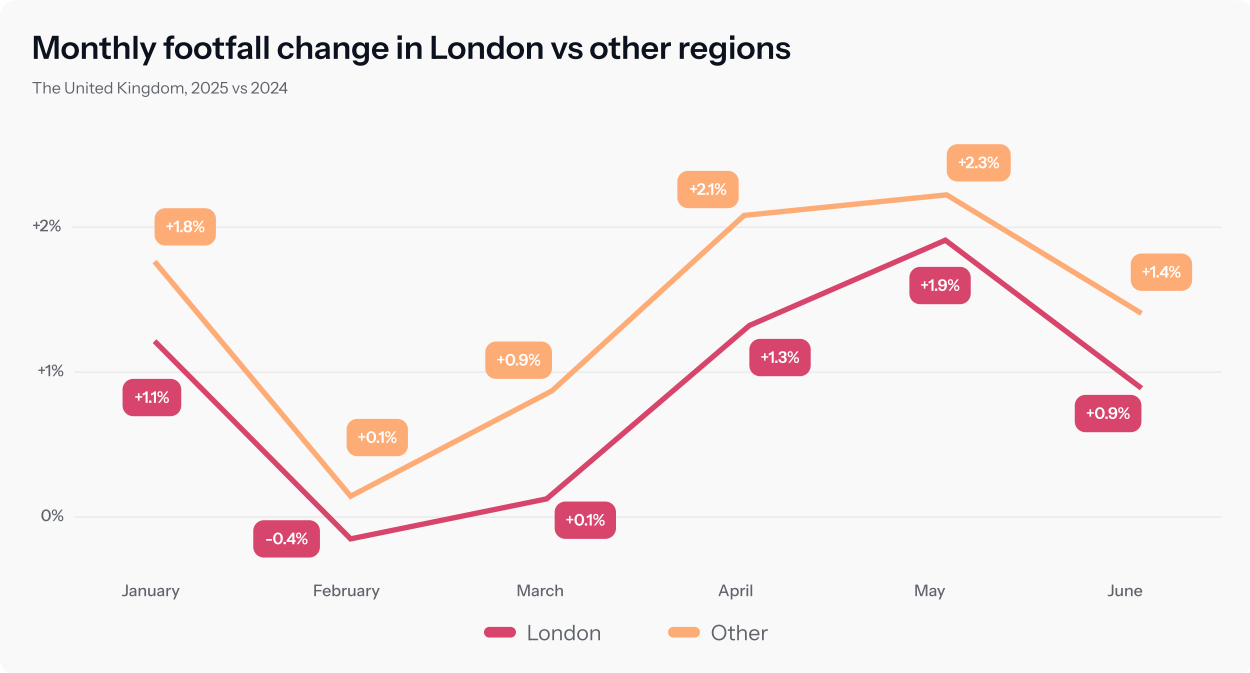

Figure 34: Monthly footfall change in the United Kingdom, London vs other regions, 2025 versus 2024

From March onwards, regional footfall consistently outpaced the capital, with a high of 2.3% in May compared to London's 1.9%. The trend remained stable through June.

While London still dominates in terms of total volume, regional locations are showing renewed strength, supported by local events, tourism, and suburban resilience. This suggests that recovery is no longer limited to major urban hubs. Regional centres are becoming increasingly important in shaping national retail trends.

Confidence and footfall move at different speeds

Consumer confidence and footfall are not always aligned, with September showing a clear example. Between March and July 2024, confidence rose sharply while footfall remained flat or declined. In early 2025, both indicators moved upward, though at different rates.

This pattern highlights the influence of external triggers such as weather, promotions, and holidays on retail visits. Consumer sentiment is important, but it does not always translate directly into footfall. Retailers should remain focused on these short-term drivers when planning campaigns.

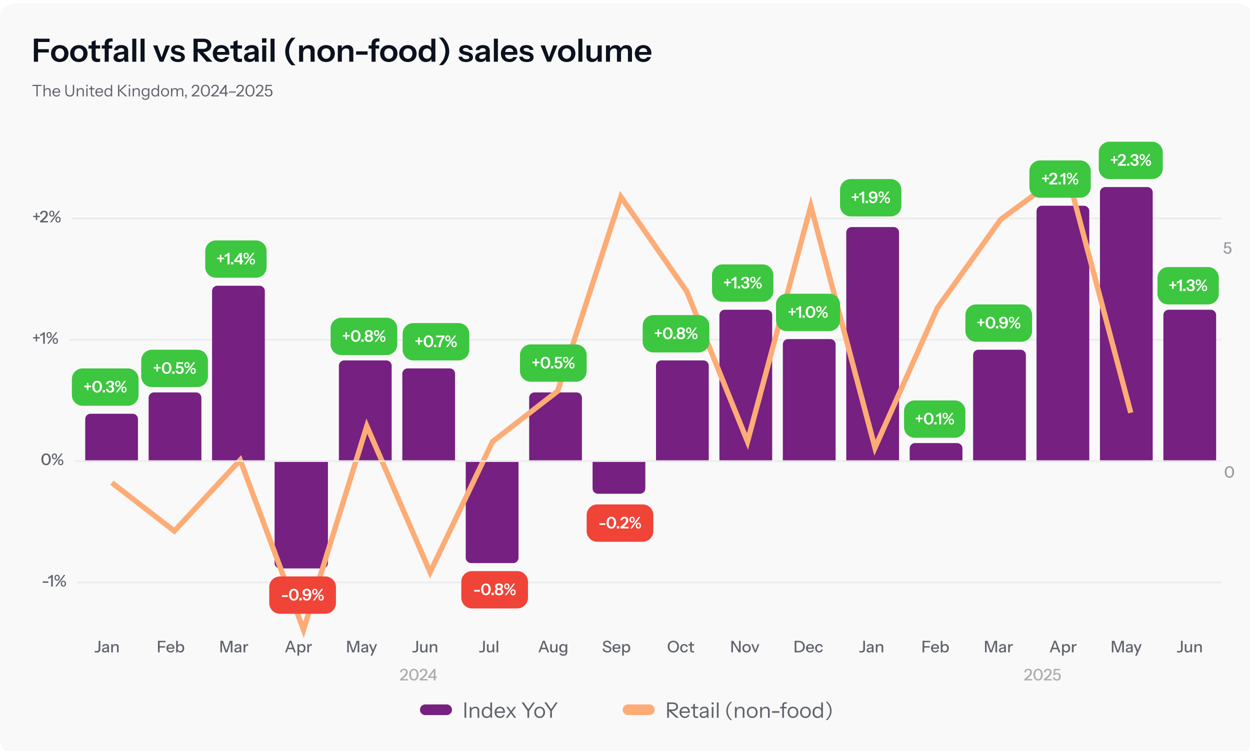

Figure 35: Footfall vs retail (non-food) sales volume in the United Kingdom, 2024–2025

More visitors, lower spend: decoupling of traffic and sales

Although footfall and non-food sales have both improved compared to 2024, their relationship remains inconsistent. In August 2024, footfall rose by 1.5%, while sales declined slightly by 0.2%. This suggests that shoppers visited physical stores without necessarily making purchases.

Conversely, April 2024 showed a 0.9% drop in footfall but a 0.7% increase in sales, indicating higher conversion among a smaller group of more purposeful shoppers. In April and May 2025, both indicators rose in parallel, suggesting brief periods where traffic did translate into performance.

The overall picture, however, reveals a disconnect. More visitors do not automatically generate more revenue. Retailers must invest in improving conversion, relevance, and in-store experience to make footfall count in a context of continued spending restraint.

“People are heading out earlier in the week, a sign that changing work patterns are reshaping the traditional rhythm of footfall.”

Summary the United Kingdom

Key trends shaping footfall in H1 2025.

What stood out in the retail rhythm?

Slow start, stronger spring rebound

Footfall was flat in January and dipped in February, but picked up through March–May, reaching a 1.2% peak in May.

City centres and malls drive growth

City centres saw 3.0% growth, with shopping centres close behind at 2.0%. Retail parks and smaller formats lagged behind.

Midday and Saturdays remain key

Midday continued as the main visit window. Despite slight weekend softening, Saturdays held strong as the core trading day.

Regional growth outpaces London

Areas outside London performed better, boosted by local activation, better accessibility, and changing consumer preferences.

Footfall ≠ sales without relevance

More visitors returned, but value-driven behaviour means success now depends on relevance, not just traffic.

Experience is the new differentiator

Urban, social, and multifunctional environments are outperforming transactional formats. Retail must now deliver purpose beyond purchase.

It's no longer about how many come through the door.

What can we expect in H2 2025?

Cautious confidence, value-led decisions

Economic stability is improving, but shoppers remain selective, focusing on value and reducing non-essential purchases.

Retail needs to flex and diversify

Formats that mix retail, food, wellness and culture are gaining traction. Single-purpose destinations must evolve to stay relevant.

Footfall to grow, but harder to convert

Visitor numbers will rise, but the gap between traffic and spend remains. Quality of experience will define success.

Autumn softens, Q4 delivers peak demand

Expect slower trading in September–October, followed by a strong Q4 led by Black Friday and Christmas activity.

Summer strength in cities and family hubs

City centres, local high streets, and destinations with family programming are set to perform well through July and August.

Closing the conversion gap is key

Retailers must turn visits into value by offering relevance, emotional connection and trust. Shoppers expect purpose, not just product.

Regional centres show relative outperformance

While London holds volume, regional and suburban hubs are growing faster, fuelled by community-led and hyper-local activity.

Strategy: align with behaviour, not just volume

Success in H2 depends on understanding changing routines. Midday peaks, weekend strength, and local momentum are now strategic levers.

03

Conclusion & outlook

Key conclusions

Footfall may follow the rhythm, but performance plays to a different beat; timing, trust and local relevance now set the pace.

The first half of 2025 confirmed a key trend across UK and European retail: footfall is recovering, but shopping behaviour is more deliberate. Consumers are returning in greater numbers, yet their spending patterns are influenced by tighter budgets, heightened selectivity, and a growing demand for relevance and value.

Presence does not equal performance

Across both the UK and the Netherlands, footfall followed a clear seasonal rhythm; driven by holidays, weekends, and midday peaks. However, consumer confidence and sales did not always align with this pattern. In the Netherlands, formats like Frun centres and regional hubs led in footfall, but turnover remained inconsistent. In the UK, high streets performed well and regional growth outpaced London, while retail parks underperformed and visit timing patterns shifted.

Retail is now experience-led and time-sensitive

Across all markets, the role of footfall is evolving. It remains a vital signal but no longer defines success on its own. Retail environments must now deliver flexibility, multi-functionality, and experience to thrive. Locations that combine social connection, everyday utility, and emotional relevance will outperform purely transactional formats.

Let's break it down for those in retail, property and investment.

Retailers

→ Focus on why people visit, not just how many

→ Make the most of midday and weekend footfall

→ Run campaigns that feel local and emotionally relevant

Landlords

→ Create flexible, all-weather spaces people want to spend time in

→ Help tenants with adaptable, responsive programming

→ Put your money into spaces that mix retail, leisure and community

Investors

→ Back formats that encourage return visits and can adapt over time

→ Value purpose and local relevance over just high footfall

→ Invest in places that combine shopping with experiences

In summary, here's what to expect in retail.

For the second half of 2025

Retail footfall is expected to stay strong throughout the summer, particularly in destinations that appeal to tourists and families. However, increased traffic does not necessarily translate into higher in-store engagement. Shoppers are becoming more intentional, making fewer trips but with a clearer purpose.

A slight decline in footfall is likely in September, although this is expected to recover quickly as early holiday shopping begins. The final quarter of the year should see a peak in activity, shaped by more flexible, off-peak shopping habits linked to hybrid working patterns.

Destinations that offer a covered, mixed-use environment with food, leisure and retail under one roof are set to perform best. Ultimately, success will depend on the ability to turn each visit into a meaningful and engaging experience.

Connect with our data experts

Would you like to discuss these insights with one of our data experts? If you have any questions, want to dive deeper, or explore what this data means for your retail space, please get in touch.

Get in touch

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