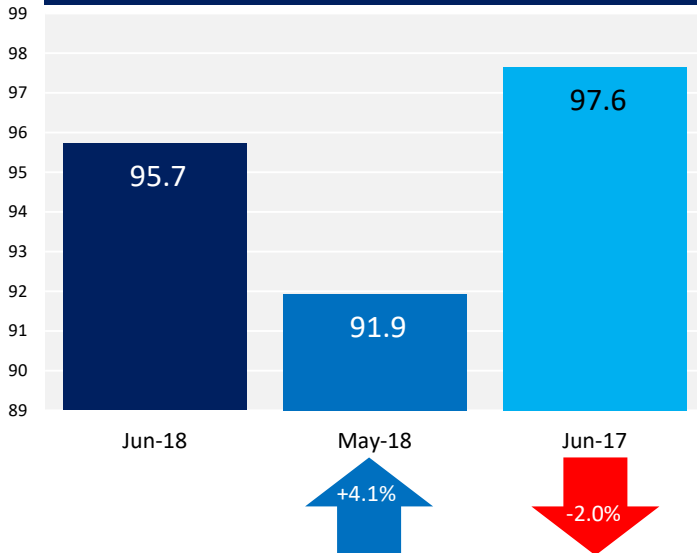
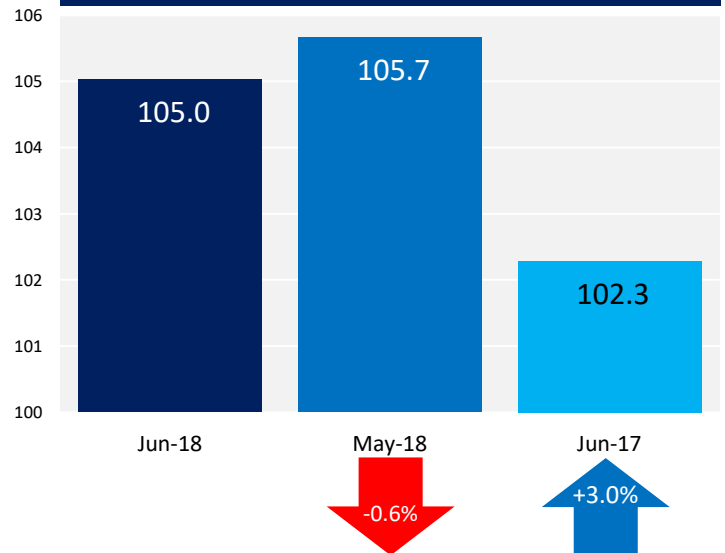


**JULY 2018**

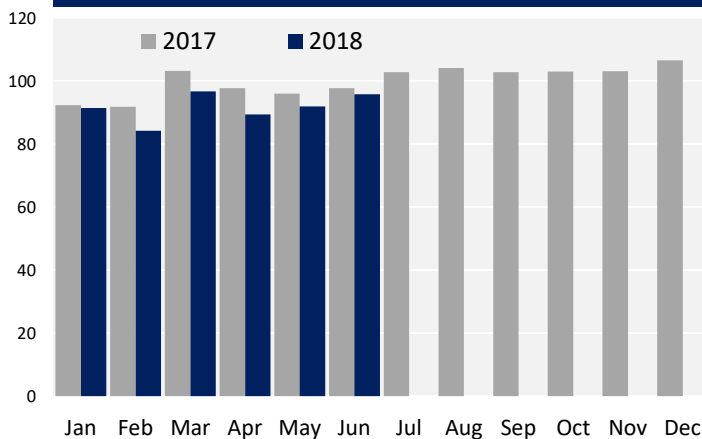
**MARKETS FOOTFALL INDEX (JUNE)**



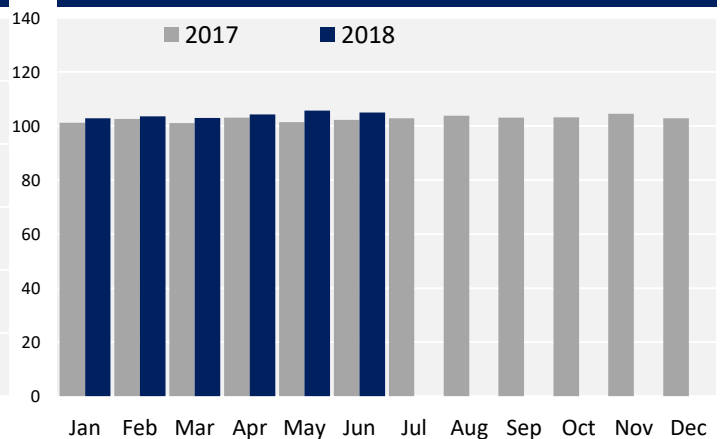
**RETAIL SALES VOLUME INDEX (JUNE)**



**MARKETS ANNUAL FOOTFALL TREND**



**ANNUAL RETAIL VOLUME TREND**



1 <sup>st</sup> to 5 <sup>th</sup> June 2018		6 <sup>th</sup> to 12 <sup>th</sup> June 2018		13 <sup>th</sup> to 20 <sup>th</sup> June 2018		21 <sup>st</sup> to 30 <sup>th</sup> May 2018	
Occasional rain, but becoming warmer		Warm but with thundery showers		Unsettled weather, but with light rainfall		Hot, sunny weather, with record highs of 30°C	

Record warm weather at the end of June plus England's sparkling progress in the World Cup proved a mixed blessing for retailers and market operators alike.

Grocers prospered with increased sales of beers, wines, BBQ and picnic foods, and Marks and Spencer reported a run on men's waistcoats. But other retailers suffered reduced sales as customers flocked to giant screens and household TV's instead of High Streets and Shopping Centres.

Ipsos Retail Performance reported footfall down by almost 19% against the previous week when England played Sweden on Saturday July 7<sup>th</sup>, hitting retailers on the day when it hurts most. Yet online retail confirms its attractions, maintaining a share of 18% of all retail, World Cup or no World Cup

Footfall in retail markets bounced back strongly from a weak May performance, gaining 4.2% MoM. But predictions of a turnaround for markets would be premature in the context of a further YoY decline of 2% for June.