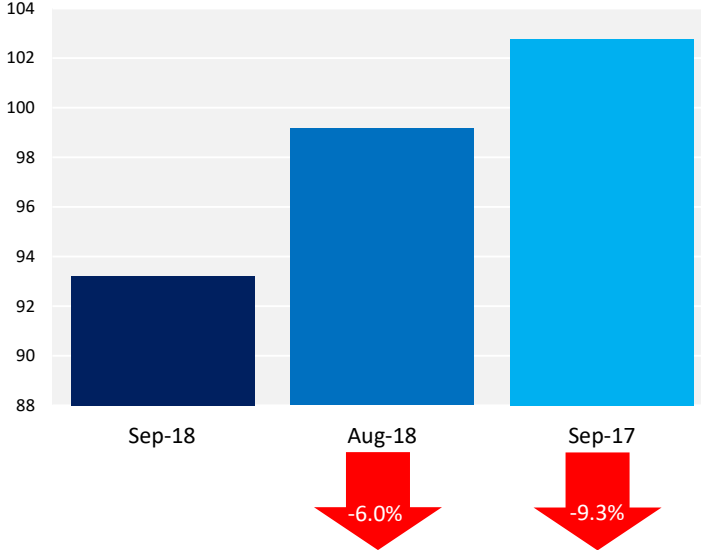
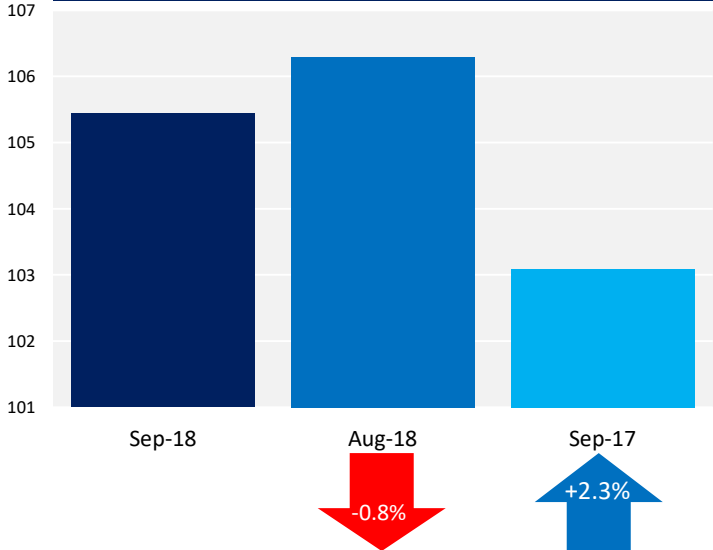


**OCTOBER 2018**

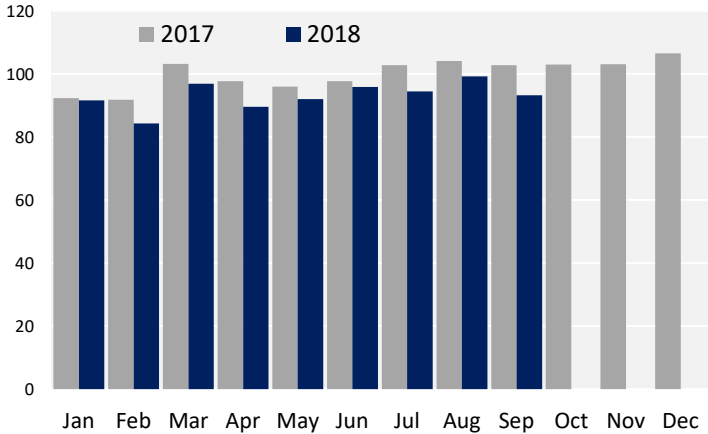
**MARKETS FOOTFALL INDEX (SEPTEMBER)**



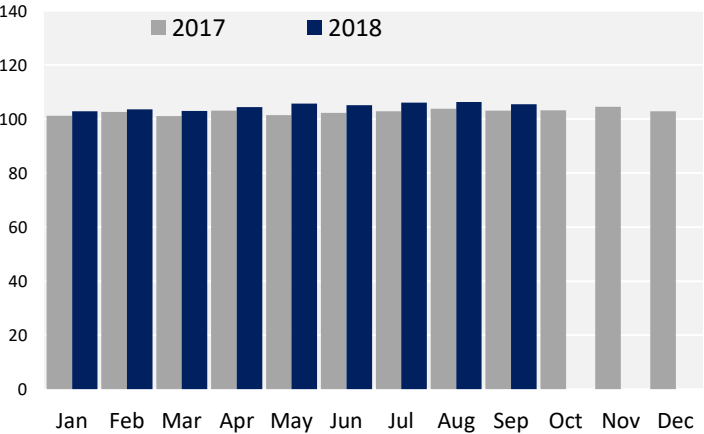
**RETAIL SALES VOLUME INDEX (SEPTEMBER)**



**MARKETS ANNUAL FOOTFALL TREND**



**ANNUAL RETAIL VOLUME TREND**



1 <sup>st</sup> to 5 <sup>th</sup> Sep 2018		6 <sup>th</sup> to 14 <sup>th</sup> Sep 2018		15 <sup>th</sup> to 23 <sup>rd</sup> Sep 2018		24 <sup>th</sup> to 30 <sup>th</sup> Sep 2018	
Warm, dry weather		Cloudy with some showers		Bright, but very windy		Sunny but cold, especially at night	

A month of largely dry and bright weather did nothing to stem the continuing slide in footfall in the UK's retail markets, with PFM Footfall Intelligence recording a YoY fall for September almost reaching into double figures. Footfall on the High Street did little better, with Ipsos Mori's Retail Traffic Index recording a fall of -4.4% for non-food stores. The RTI records a better performance - an increase of 0.1% - for clothing and footwear retailers, reflecting the once significant 'back to school' boost.

Our figures above, which strip out the contribution of inflation, show a battling performance by the UK retail sector as a whole to record an increase in retail spend of 2.3% YoY. But to put September 2018 into context, KPMG describe the performance as the weakest sales growth for 5 months. The backdrop is given by the index of those expecting to be financially better off in 2019 : down from 26% in July to 22% in September.