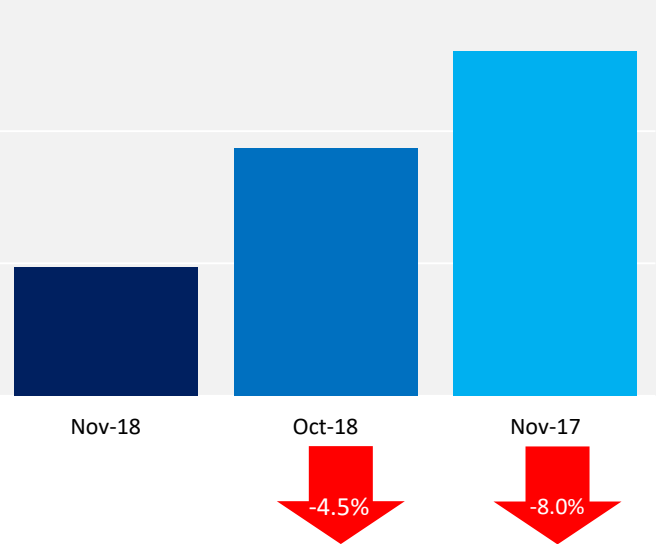
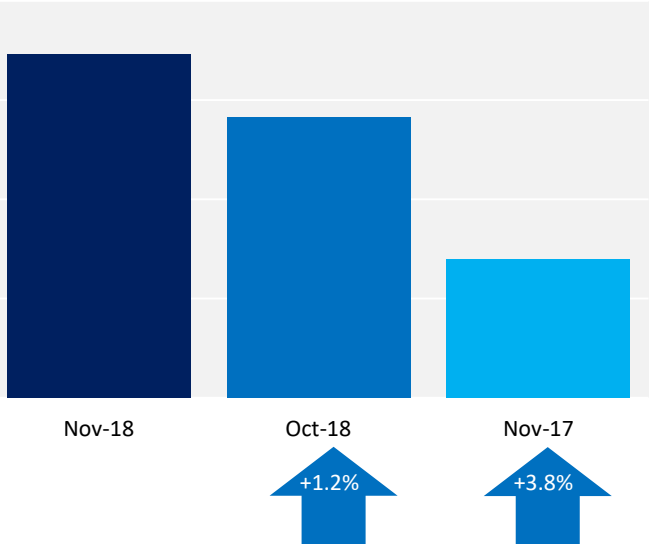


DECEMBER 2018

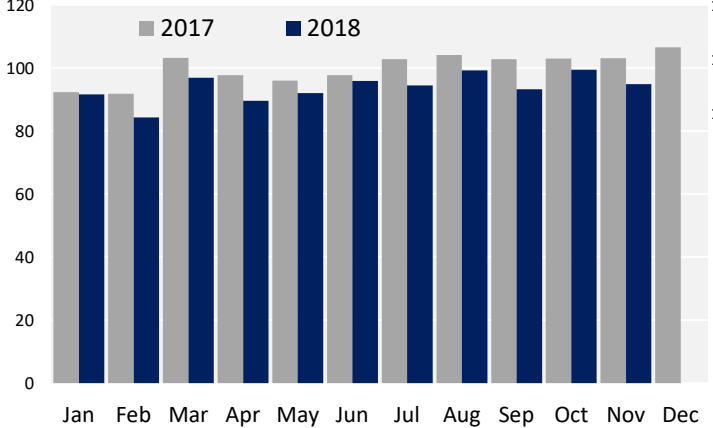
MARKETS FOOTFALL INDEX (NOVEMBER)



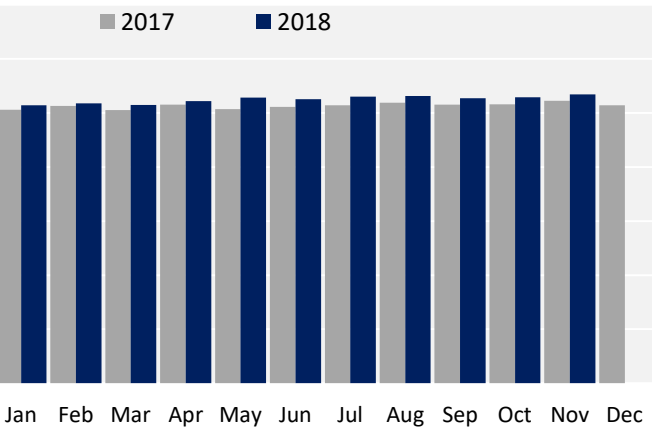
RETAIL SALES VOLUME INDEX (NOVEMBER)





MARKETS ANNUAL FOOTFALL TREND



ANNUAL RETAIL VOLUME TREND



1 st to 14 th Nov 2018	15 th to 18 th Nov 2018	19 th to 26 th Nov 2018	27 th to 30 th Nov 2018
Mild, dry, wet in parts 	Settled weather, cloudy 	Cold, windy with rain in the south, drier in Scotland 	Very mild, wet and windy 

A month of mixed but mainly mild temperatures didn't have a positive impact on footfall numbers in the UK's retail markets in November. Analysis by PFM Footfall Intelligence indicates an decrease of 4.5% against October 2018, with the YoY trend continuing downwards, down 8% on 2017, higher than last months 3.5% decreases. In contrast the UK shopping centre index showed a smaller decrease of 2.1% on last year but an increase on October of 3.1%, much more in line with the ONS data. The Black Friday weekend failed to inspire shoppers this year, with Black Friday itself down 4.5% on 2017.

ONS figures suggest that while large retailers (both online and offline) had a dismal November, "Christmas apparently came early for small businesses" said the British Retail Consortium, pointing to figures suggesting that sales among small retailers had been up more than 13% compared with the previous November, while sales for large businesses had risen less than 2%.

So while November's retail sales figures were better than expected, behind the figures there are signs of considerable challenges for High Street shops.