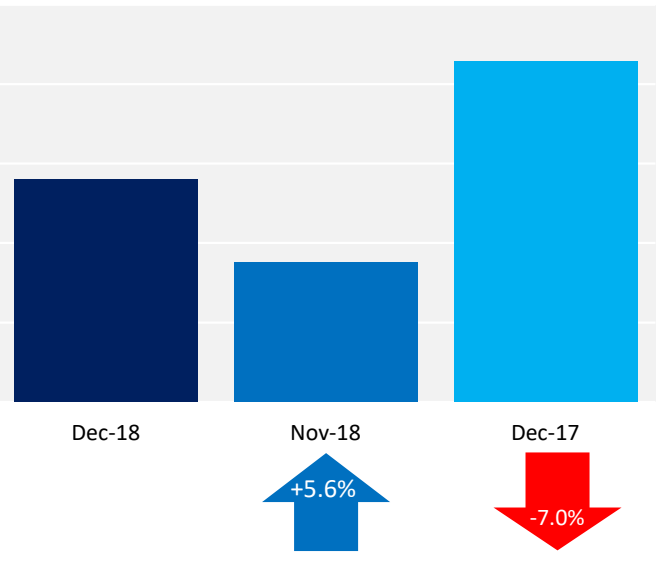
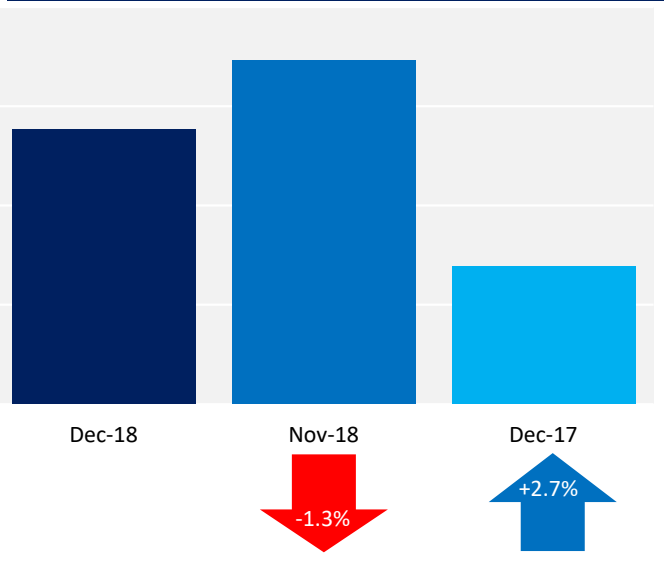


JANUARY 2019

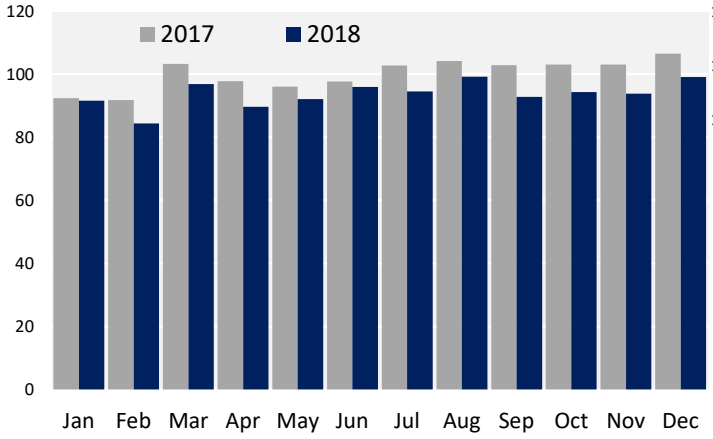
MARKETS FOOTFALL INDEX (DECEMBER)



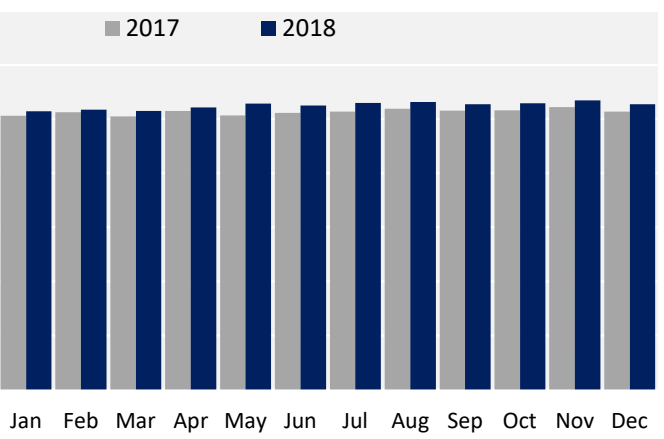
RETAIL SALES VOLUME INDEX (DECEMBER)



MARKETS ANNUAL FOOTFALL TREND



ANNUAL RETAIL VOLUME TREND



1 st to 4 th Dec 2018		5 th to 16 th Dec 2018		17 th to 23 rd Dec 2018		24 th to 31 st Dec 2018	
Mild and wet with westerly winds		Continuing wet, but colder in the East		Mild with patchy rain		Returning to mild, cloudy weather	

Bumper Boxing Day discounts of 43% failed to brighten the gloom on the UK's High Streets, with a raft of national retailers reporting their worst Christmas performance in a decade. The ONS blames the success of Black Friday for bringing Christmas shopping forward into November. Michael Ward, positioning his store Harrods as the 2nd biggest payer of business rates in the UK, begs government to balance the burden of taxes and compliance more evenly between physical and online retailers. For December 2018 Springboard show YoY footfall down across the board, reporting falls of 3.2% on the High Street, 2.8% in retail parks, and a whopping 4.8% for shopping centres. This follows a disastrous December 2017, when footfall was damaged by transport difficulties. December retail footfall has declined by more than 10% since December 2015. In line with this performance, PFM Footfall Intelligence report footfall in retail markets down by 7% YoY, though at least recovering by 5.6% from November's weak figure.