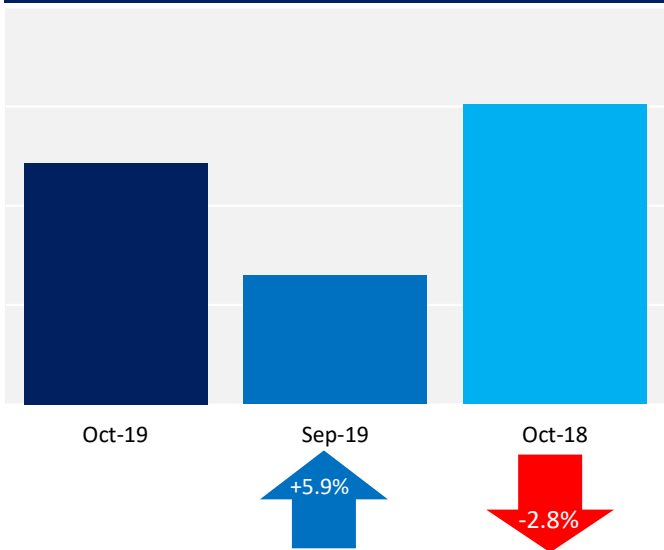
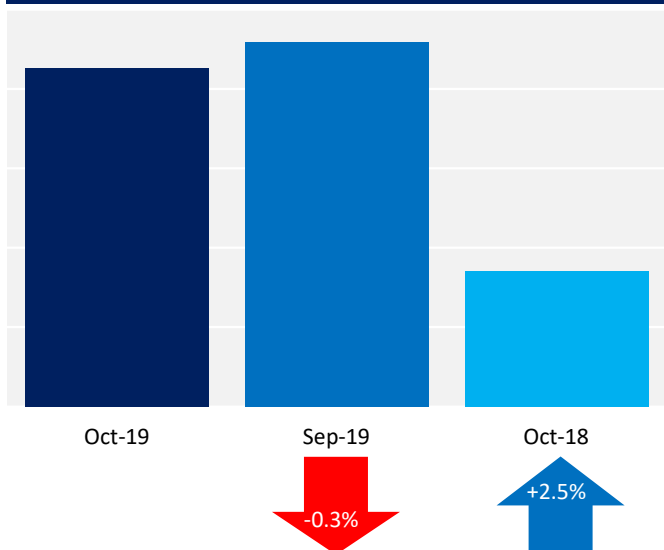


NOVEMBER 2019

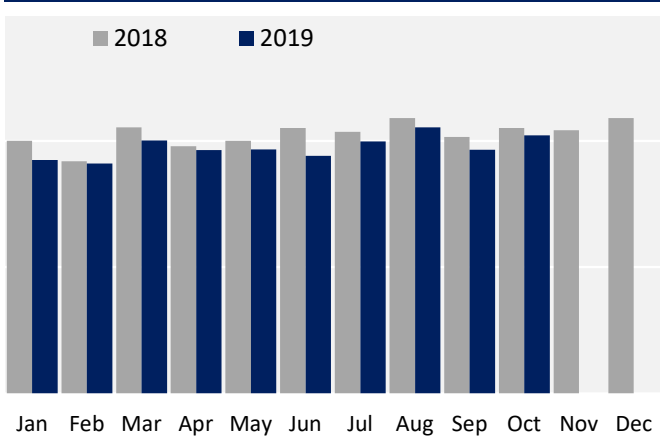
MARKETS FOOTFALL INDEX (OCT)



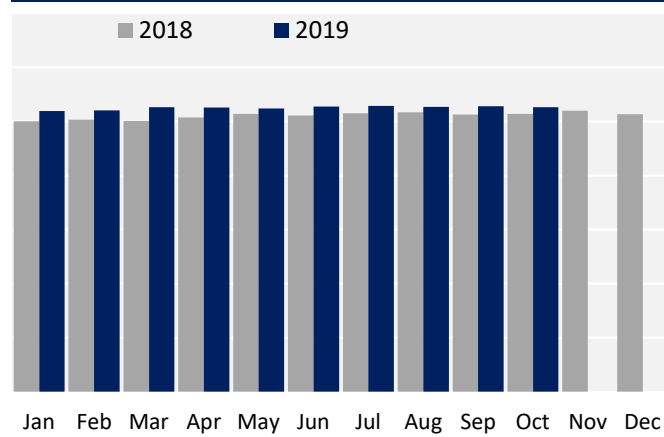
RETAIL SALES VOLUME INDEX (OCT)



MARKETS ANNUAL FOOTFALL TREND



ANNUAL RETAIL VOLUME TREND



1 st to 6 th Oct 2019	7 th to 12 th Oct 2019	13 th to 26 th Oct 2019	27 th to 31 st Oct 2019
Mild with widespread rain 	Heavy rain with bright interludes 	Frequent bands of rain 	Colder but brighter weather 

Adding to the sector’s woes, shoppers were kept away from High Streets and shopping centres by early wintry weather that gripped the UK throughout October 2019. The Guardian reported the weakest retail sales performance since April 2018, as political uncertainty deterred spend on big ticket items like furniture and cars. Department stores rallied, posting a YoY increase of 2% after a series of disastrous months – but the Guardian believes the increase was supported by promotions and early introduction of Christmas lines. Consultancy Capital Economics expected colder, wetter weather in October would boost sales of winter clothing – but in fact the sector returned a decline of -1% MoM. Drapers Online reports that patchy sales performance was matched by a further decline in town centre footfall of -3.2% YoY. For once shopping centres (down -2.4%) outperformed High Streets (down by -4.9%). PFM Footfall Intelligence reports markets at the higher end of retail footfall performance with a YoY decline of -2.8%, and a strong recovery against September, up by 5.9% MoM. Market operators will be hoping to continue this recovery into the Christmas Markets period