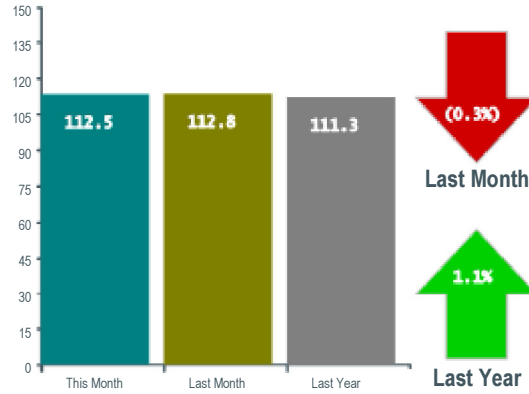
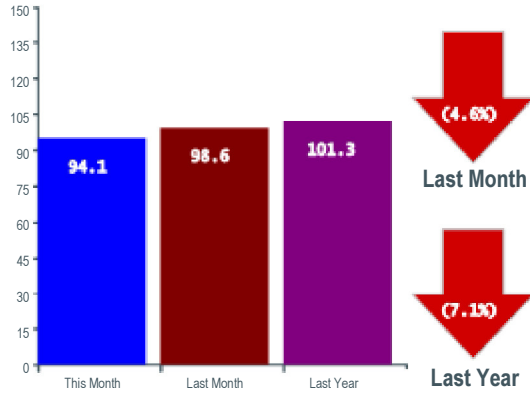


September 2015

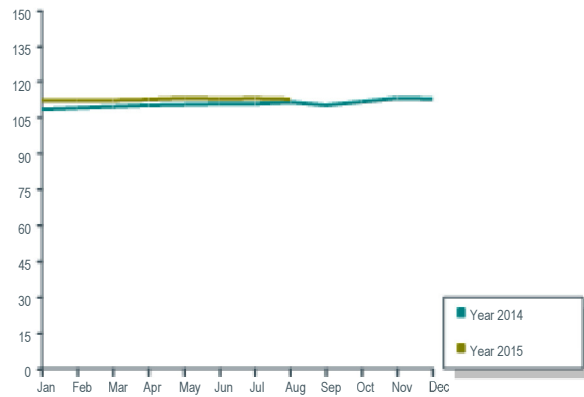
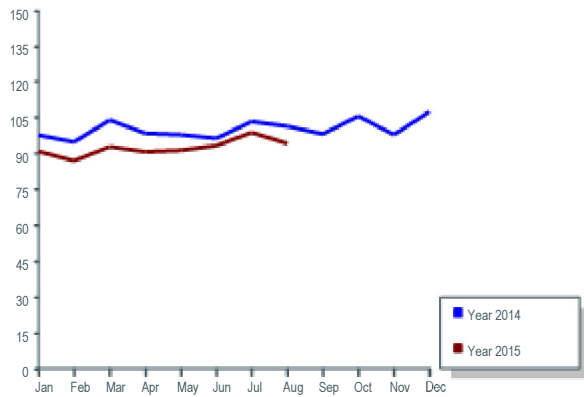
Markets Footfall Index (August)

Retail Sales Value Index (August)



Annual Footfall Trend

Annual Retail Sales Trend



Weather

1st-6th Aug 2015		7th-12th Aug 2015		13th-21st Aug 2015		22nd-31st Aug 2015	
17.2°C		18.3°C		16.7°C		17.2°C	
Dry with sunny spells		Dry and warm		Heavy rain with thunderstorms but warm		Cloudy with frequent rain	

Following four consecutive months of improvement up to July 2015, the recovery of footfall in UK Markets came to a halt in August, with a juddering drop of 7% Year on Year. The Markets sector was not alone in witnessing a disappointing August, with Springboard reporting YoY decline of 2.3% on High Streets and a daunting 2.8% in shopping centres, the 5th consecutive monthly fall for the shopping centre sector.

Weather-wise August was a month of two halves, with warm and dry conditions in the first half (when many shoppers were on holiday) followed by a wet second half with thunderstorms, (when many families are traditionally shopping for the back-to-school experience).

The outcome was a month of weak sales figures, down by 1.1% YoY, ending a trend of modest but steady increases since the beginning of the year. High Streets and shopping centres will look to the fact that this year only one day of the Bank Holiday weekend fell in August and hope for stronger figures in September – but this factor is unlikely to apply to markets, many of which close on Bank Holiday Mondays.