

ATCM - Springboard

National High Street Index

March 2010 Commentary



Footfall in the UK's high streets increased by 6.7% between February and March this year - the largest month on month increase in March since 2007, and nearly double the monthly increase recorded in March 2009. Annually, however, footfall fell by 3% in March which was a more significant drop than the 0.2% decline in March 2009.

Notwithstanding this, in overall terms, the performance of the UK's high streets over the first quarter of 2010 has been on par with 2009 with an average decline in footfall of 5.3% for the first three months in both years. This may indicate that the impact of the recession on town centres has finally bottomed out, particularly as this is in the face of the continued growth of non-food non-store sales which saw an annual increase of 15.9% in March.

The performance of the UK high streets appears at first to run counter to sales trends, however, on closer examination there are key similarities. Whilst the BRC reported an annual like for like increase in sales of 4.4% in March, it is likely that a significant proportion of this growth is accounted for by food which they reported as picking up strongly towards the end of the month. Moreover, according to the BRC the sales of clothing and footwear - typically the lifeblood of town centres - slowed sharply with sales of womens' clothing actually lower this March than in March 2009. And even for department stores, the BRC reported a mixed performance in the sales of clothing and footwear this month.

Whilst Easter did not occur in March this year, the proximity of the weekend to the end of the month, suggests that awareness of the results would be helpful. The performance of high streets over Easter was varied - nationally footfall increased year on year on Good Friday (by 1.7%) but fell on Easter Saturday (-1.3%). And the same was true amongst different types of town: whilst footfall was higher on Good Friday this year than last in seaside and historic towns, on Easter Saturday the position was reversed with a drop of 7.8% in footfall in seaside towns compared with Easter Saturday 2009, and a lesser decline of 2.2% in historic towns.

All Towns and Cities

Annual Change:

| | |
|------------------|-------|
| Mar 09 to Mar 10 | -3.0% |
| Feb 09 to Feb 10 | -7.5% |
| Jan 09 to Jan 10 | -9.5% |

Month on month change:

| | |
|------------------|--------|
| Feb 10 to Mar 10 | 6.7% |
| Feb 09 to Mar 09 | 3.8% |
| Jan 10 to Feb 10 | 12.2% |
| Jan 09 to Feb 09 | 10.3% |
| Dec 09 to Jan 10 | -29.7% |
| Dec 08 to Jan 09 | -32.0% |

Regional Cities

Annual Change:

| | |
|------------------|-------|
| Mar 09 to Mar 10 | -2.8% |
| Feb 09 to Feb 10 | -7.4% |
| Jan 09 to Jan 10 | -9.6% |

Month on month change:

| | |
|------------------|--------|
| Feb 10 to Mar 10 | 5.5% |
| Feb 09 to Mar 09 | 0.1% |
| Jan 10 to Feb 10 | 14.2% |
| Jan 09 to Feb 09 | 12.7% |
| Dec 09 to Jan 10 | -33.7% |
| Dec 08 to Jan 09 | -36.2% |

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