

# ATCM-Springboard National High Street Index



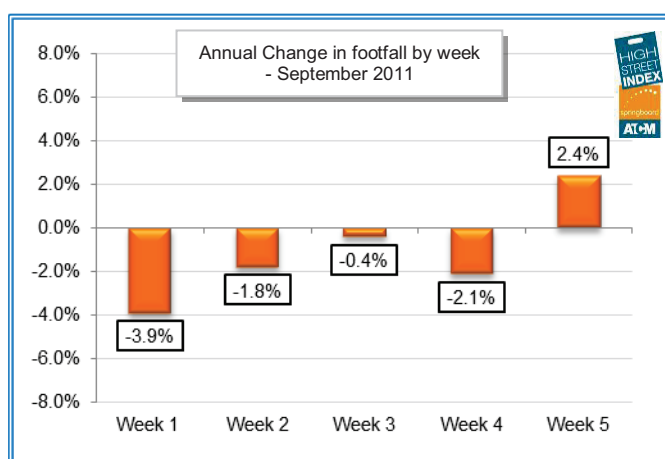
## September 2011 Commentary

Nationally our high streets footfall fell by 2.6% over the month from August to September and by 1.2% over the year from September 2010.

The decline in footfall for the year to date remains at -1.4%, the same as that in both July and August. This lends further support to the argument that things are bottoming out for high streets, as -1.4% is the most modest decline recorded for this nine month period since the Index was first published in 2006, and is half of the rate of the decline of 2.8% that was recorded during the same nine month period in 2010.

The Index has also revealed that in both August and September annual decline in footfall in our large regional cities was significantly above the national average: -8.6% in August and -7.6% in September. Excluding regional cities, footfall actually increased over these two months, with a positive year on year change of 1.3% in September. This is a clear indication that even in this period of austerity our high streets are increasing their customer base, albeit that the growth is in the support for smaller town centres rather than larger city centres further afield.

The Indian Summer that came upon us unexpectedly in the last week of the month contributed positively to the overall result for September, as it was the only week of the month that recorded a positive annual change in footfall (+2.4%). Indeed, if footfall in the last week had been similar to the last week of September in 2010, the month's results would have dropped noticeably, from the recorded annual change of -1.2% to -2.5%.



### All Towns and Cities

#### Annual Change:

Sep 10 to Sep 11	-1.2%
Aug 10 to Aug 11	-1.5%
Jul 10 to Jul 11	-1.2%
Jun 10 to Jun 11	-2.2%

#### Month on Month Change:

Aug 11 to Sep 11	-2.6%
Aug 10 to Sep 10	-2.6%
Jul 11 to Aug 11	-2.6%
Jul 10 to Aug 10	-0.4%
Jun 11 to Jul 11	4.7%
Jun 10 to Jul 10	3.1%

### Regional Cities

#### Annual Change:

Sep 10 to Sep 11	-7.6%
Aug 10 to Aug 11	-8.6%
Jul 10 to Jul 11	-2.5%
Jun 10 to Jun 11	-4.7%

#### Month on Month Change:

Aug 11 to Sep 11	-2.4%
Aug 10 to Sep 10	-2.9%
Jul 11 to Aug 11	-2.9%
Jul 10 to Aug 10	0.3%
Jun 11 to Jul 11	4.5%
Jun 10 to Jul 10	3.8%