



Heart of Manchester BID

Week 2, 2018

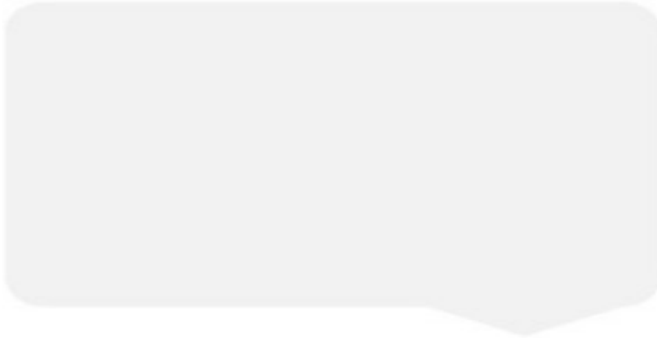
07/01/2018 to 13/01/2018



REGION - North & Yorkshire

Sunday to Saturday

Messages from Centre



Weekly Footfall

| | Year To Date % Change | Year on Year % Change | Week on Week % Change |
|-------------------------|-----------------------|-----------------------|-----------------------|
| Heart of Manchester BID | 7.9% | 9.8% | 12.0% |
| North & Yorkshire | 0.9% | 0.6% | 2.2% |
| UK | -0.4% | -1.9% | -2.0% |

Springboard Insights

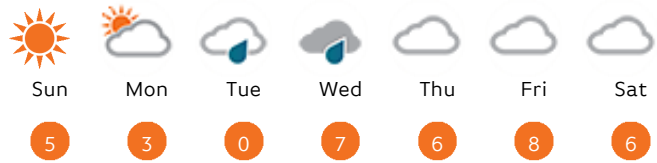
The second week of the year, and the first working week without a Bank Holiday, delivered unexpected good news; with only a marginal drop in footfall of -0.9% from the same week last year when footfall dropped by a far greater -4.2%. Indeed, in part it is likely that the more stable footfall is a result of the weak comparable last year. Notwithstanding this, footfall in all three destination types improved on last year, with the largest uplift in Retail Parks where footfall rose by +1.5% compared with a drop of -3.8% in 2017. However, footfall in Shopping Centres - whilst still in negative territory this year of -0.8% - improved significantly from the drop of -5.8% last year. High Streets underperformed Shopping Centres with a drop in footfall of -1.9%, but again this was an improvement on the decline of -3.6% in 2017.

Weekly Sales

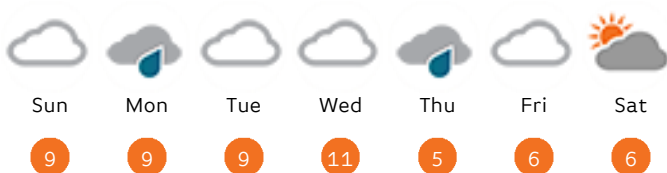
| | Year on Year % Change | Week on Week % Change |
|--|-----------------------|-----------------------|
| Heart of Manchester BID Weekly Sales Index | 1.0% | 0.0% |
| BDO Sales | 4.8% | |

Weather

This Year



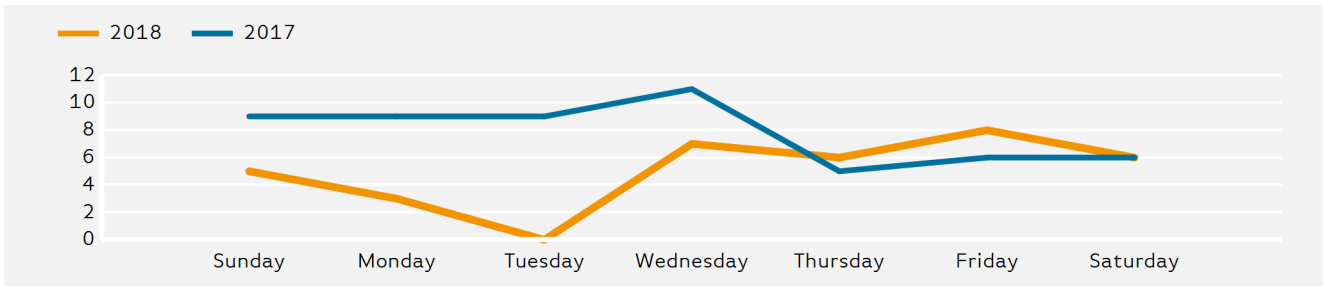
Last Year



Weather Avg Temps

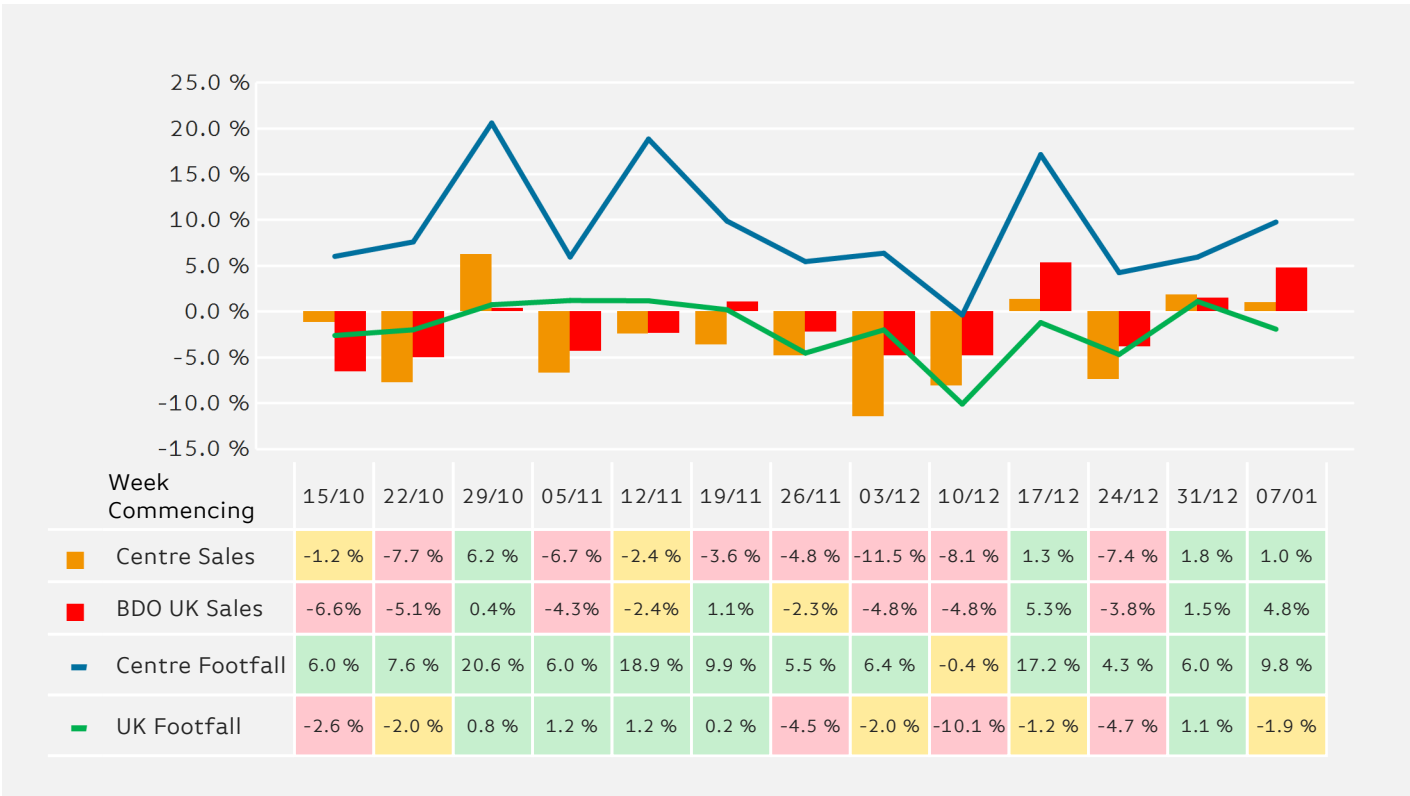
| | Average High Temperature | Average Low Temperature |
|------|--------------------------|-------------------------|
| 2018 | 5.0 | 2.0 |
| 2017 | 8.4 | 3.7 |

Maximum Temperatures

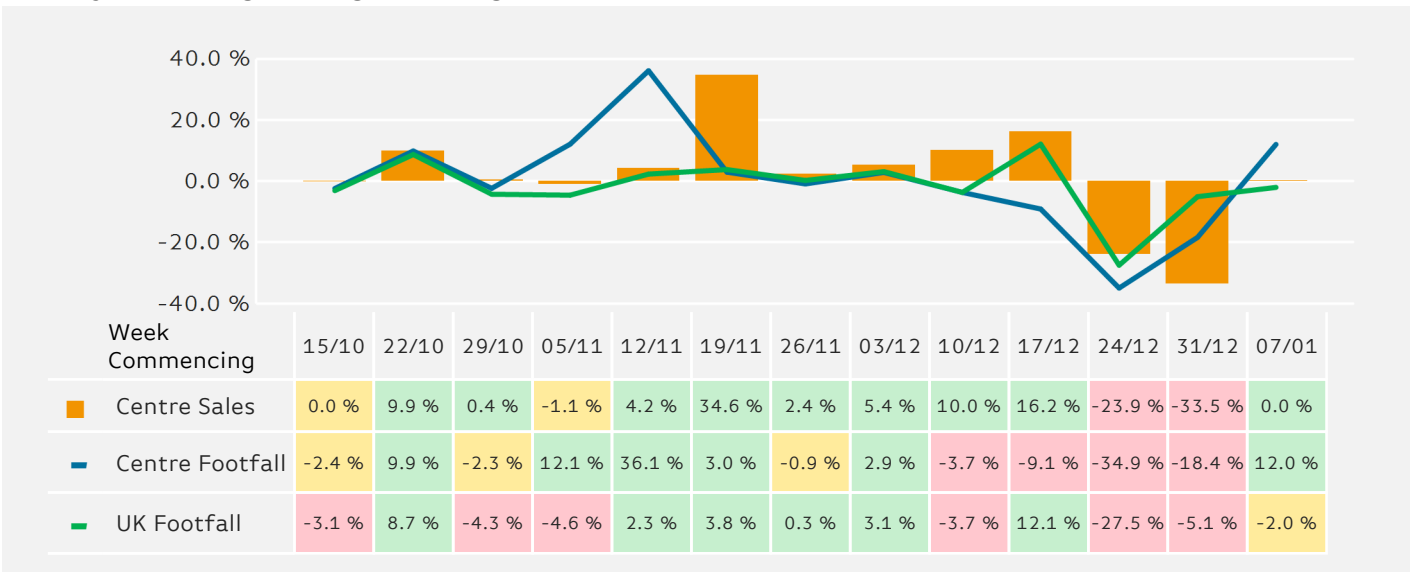


Sales & Footfall Data

Annual Percentage Changes (rolling 13 weeks)

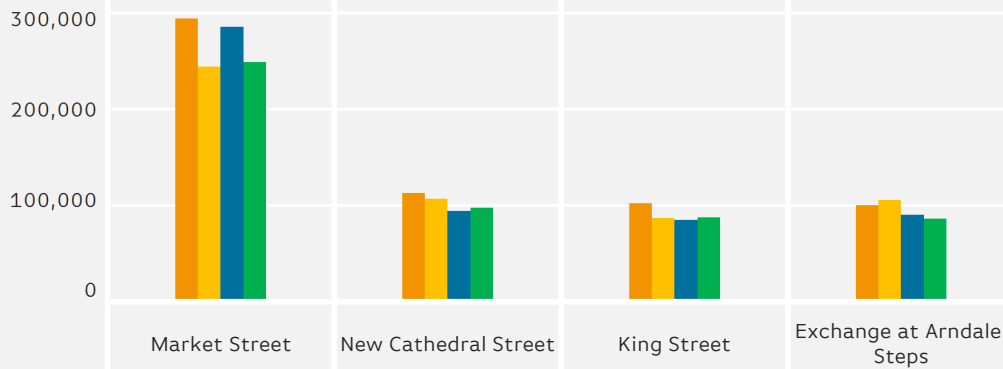


Weekly Percentage Changes (rolling 13 weeks)



Footfall by Location

■ This Week
 ■ Previous Week
 ■ Previous Year
 ■ 2 Years Ago



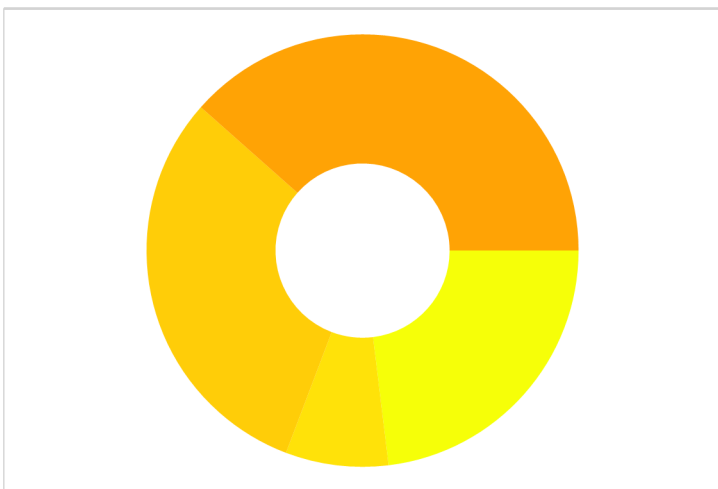
| | Market Street | New Cathedral Street | King Street | Exchange at Arndale Steps |
|-----------------------|---------------|----------------------|-------------|---------------------------|
| This Week | 294,181 | 112,533 | 101,965 | 100,022 |
| Previous Week | 244,393 | 106,678 | 87,010 | 105,343 |
| Previous Year | 285,680 | 93,877 | 84,908 | 89,985 |
| 2 Years Ago | 249,121 | 97,102 | 87,620 | 86,225 |
| Week on Week % Change | 20.4 % | 5.5 % | 17.2 % | -5.1 % |
| Year on Year % Change | 3.0 % | 19.9 % | 20.1 % | 11.2 % |

Counting By Location Main Locations Only



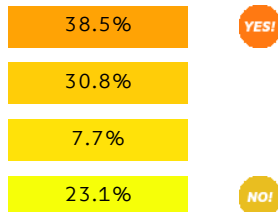
- Market Street, 48.3 %
- New Cathedral Street, 18.5 %
- King Street, 16.8 %
- Exchange at Arndale Steps, 16.4 %

Retailer Feedback Statement



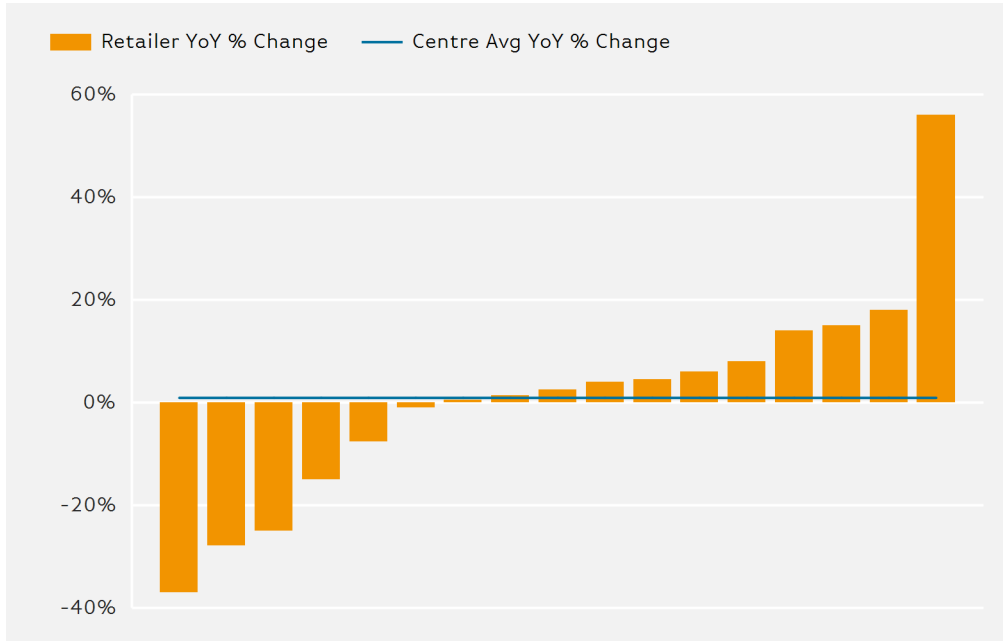
We asked you to rate this statement

Online sales returns continue to be larger by volume than store bought returns



Next weeks statement is:
Stock levels of autumn / winter were less this year ensuring a speedier sale period

Sales Spread



Notes:
 *The Regional Benchmark comprises of High Street locations within the BRC defined region of North & Yorkshire. National Benchmarks comprise of High Street locations within the entire UK.
 BRC Calendar: The BRC calendar ensures that each month consists of full weeks, to enable data comparison
 Gross Sales: We collect Gross Sales for the tracker (these include VAT)
 Weekly Sales / Footfall: -
 % change YTD – the % change in footfall / sales for the year so far, compared to the same period last year
 Annual % change – The % change in footfall / sales from the same week the previous year
 Weekly % change – The % change in footfall / sales from the previous week