BDO HIGH STREET SALES TRACKER

NOVEMBER MONTHLY REVIEW 4 weeks until 31 Oct 2010

5 Nov 2010

Half-term & Halloween sparks growth

TOTAL
+4.1%

October 2009: +2.1%

- Despite the obvious negative fall-out from the Comprehensive Spending Review, trading conditions on the high street remained remarkable upbeat during October. Overall, medium sized retailers reported like-for-like sales up by 4.1 per cent.
- Typical autumn weather helped stimulate seasonal clothing purchases, while the usual boost from the school half-term holidays appears to have been stronger than normal this year. In addition, the growing popularity of Halloween also had a positive impact.
- These results provide retailers with some decent momentum heading into the key Christmas period. Although the negative impact from tightening public sector spending may yet feed through onto the high street, the early signs suggest spending is currently holding up pretty well.

FASHION
+4.0%

October 2009: +1.6%

- For a second consecutive month fashion retailers benefited from on-season autumnal weather that encouraged sales of winter clothes and footwear. However, growth was more erratic than last month, with some mainstream brands underperforming.

NON-FASHION
+4.2%

October 2009: +5.0%

- A strong second half of the month heavily influenced by half-term and Halloween helped propel forward non-fashion. Luxury and leisure were the top performing categories.

HOMEWARES
+5.0%

October 2009: -1.3%

- Homewares had a pretty good month, albeit flattered by weak comparisons, with sales up in most areas. Textiles lead the way, while furniture also sold quite well.

NON-STORE
+36.9%

October 2009: +35.1%

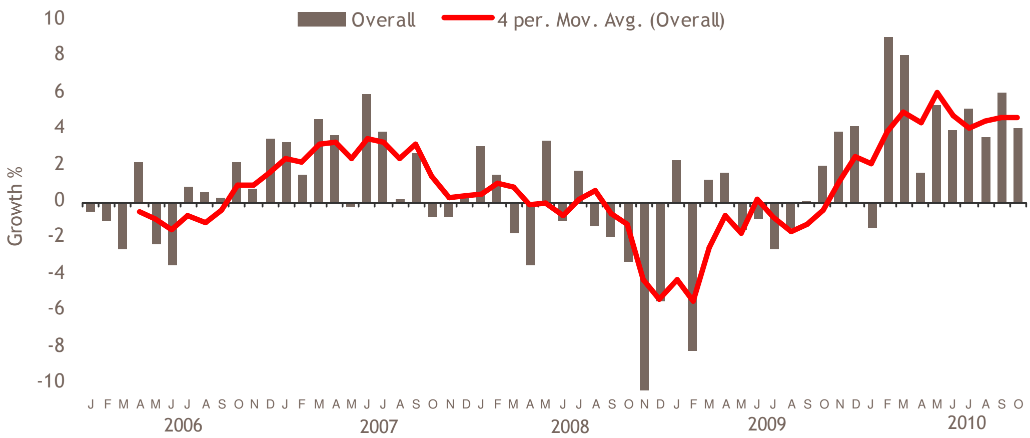
- After a slow start, sales made through non-store channels accelerated towards the end of the month, with signs of early Christmas shopping.

The High Street Sales Tracker outlines weekly like-for-like sales changes of some 70 mid-tier retailers with c10,000 individual stores across **Fashion:** accessories, clothing, footwear. **Non-fashion:** general household goods, gifts, health & beauty, leisure goods. **Homewares:** cookware, furniture & floorcoverings, lighting, linen & textiles. **Non-store:** mail order, online & other non-store channels.

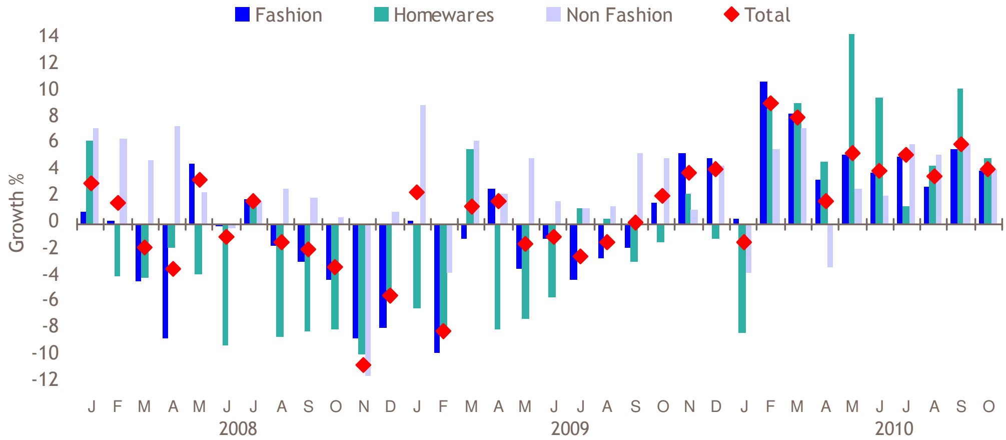
MONTHLY LIKE-FOR-LIKE RESULTS OCTOBER 2010

LFL Growth %	Week 1 (we 10/10)	Week 2 (we 17/10)	Week 3 (we 24/10)	Week 4 (we 31/10)	Total October
Fashion	+2.6	+2.2	+4.8	+6.4	+4.0
Non-fashion	+2.3	+2.0	+6.3	+6.6	+4.2
Homewares	+8.6	+1.5	+3.2	+4.9	+5.0
Non-store	+9.8	+51.0	+50.0	+34.6	+36.9
Overall	**+3.1**	**+2.1**	**+5.1**	**+6.3**	**+4.1**

MONTHLY LIKE-FOR-LIKE RESULTS 2006-2010



MONTHLY LIKE-FOR-LIKE RESULTS BY SECTOR 2008-2010



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