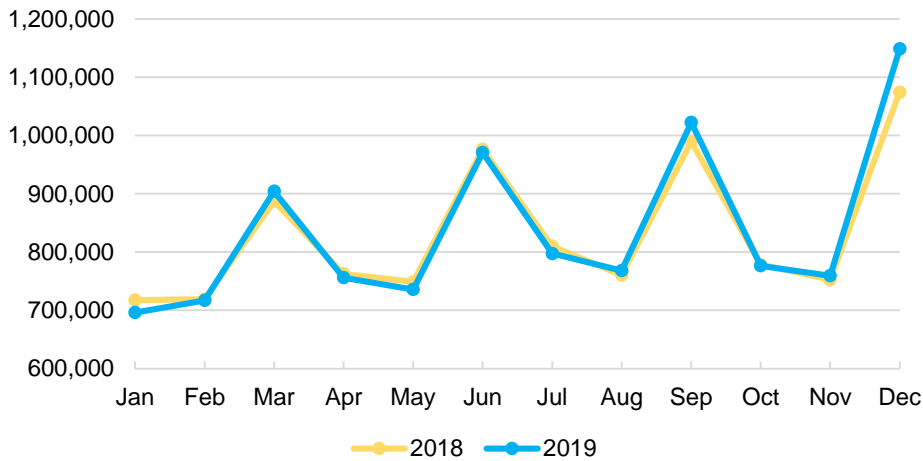


MONTHLY FOOTFALL, DEC 19



11.3%
vs. previous month

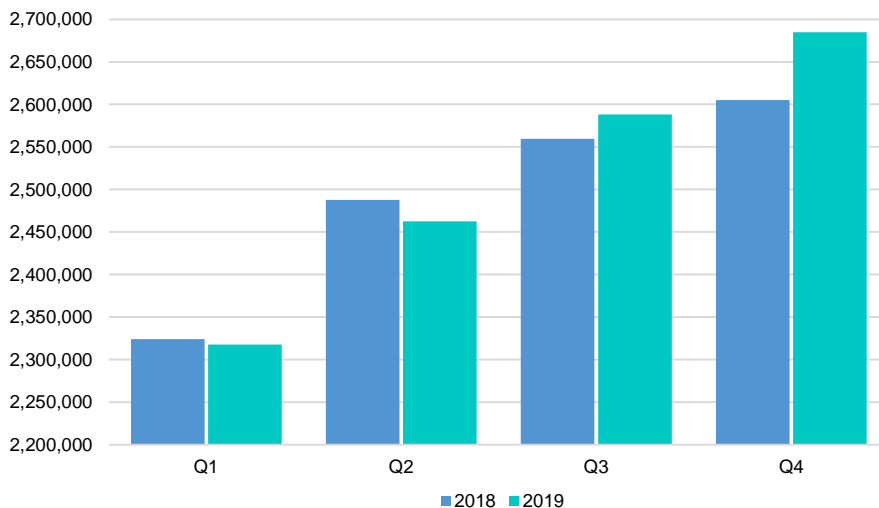
6.9%
vs. previous year

-3.5%
UK High Street Index YoY

The graph reflects footfall data collected from a camera on Clarence Street.

High Street Index supplied by Springboard reflecting 195 UK High Street locations.

FOOTFALL BY QUARTER



2019 TOTAL FOOTFALL

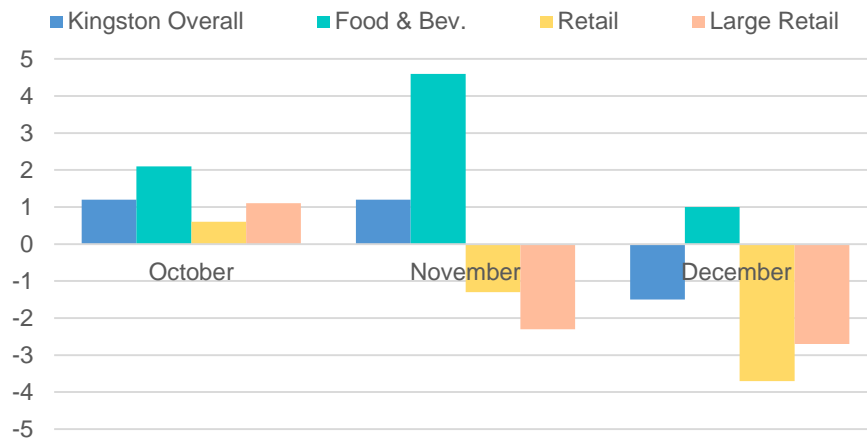
10,052,845

0.8% (Annual)
vs. previous year

-2.2% (Annual)
UK High Street Index YoY

- Overall, footfall for Kingston town centre showed a marginal annual increase of 0.8% YoY, which is positive compared to the UK High Street Index.
- The footfall percentage change for each quarter is as follows:
 - Q1: -0.3%
 - Q2: -1.0%
 - Q3: 1.1%
 - Q4: 3.1%

SALES % CHANGE YEAR ON YEAR – DEC 19



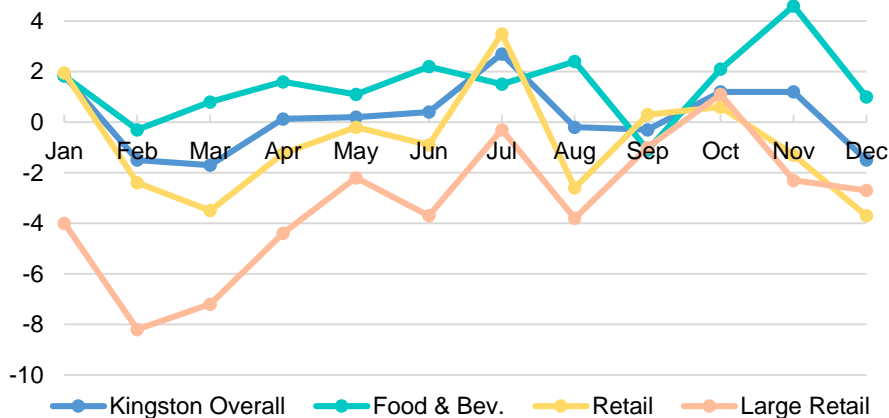
-3.1%

vs previous year

Graph reflects % change sales data from selected retailers in Kingston town centre. Weekly data figures are averaged across the month.

- The December BRC reported like for like UK retail sales increased by 1.7% YoY.
- The report explains the December figures are distorted due to the timing of Black Friday. When looking at both the November and December figures together sales declined by -0.9%. The report goes on to say Black Friday has superseded Christmas as the biggest shopping week for non-food items for the first time, and also notes consumers are becoming more cautious and also more conscientious when making purchases for Christmas.
- The BRC explains retailers face a number of challenges over the coming year including the need to improve productivity, reduce waste, increase recyclability. The report also notes the Government needs to make good on its promise to review business rates, at present retailers pay 25% of business rates, but make up 5% of the economy.
- Consumers again favoured online shopping with sales up 12.8% in December, however online growth over the November and December period was only slightly up by 2.6% YoY.
- Kingston had a mixed December in terms of sales results. Food and Beverage again enjoyed positive numbers, but retail declined by -3.7% and large retail saw numbers fall by -2.7% YoY.

SALES % CHANGE YEAR ON YEAR – ANNUAL OVERVIEW



0.1%

Overall Sales, Year to Date

1.4%

Food & Bev, Year to Date

-0.9%

Retail, Year to Date

-3.3%

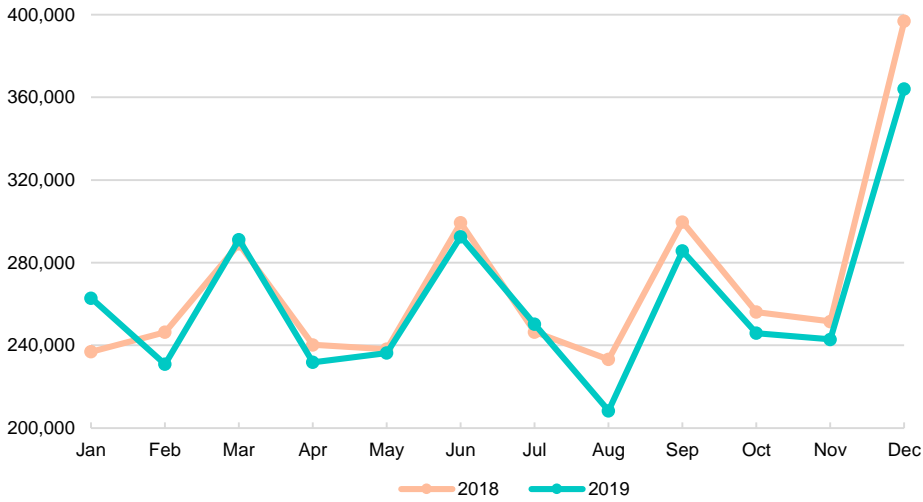
Large Retail, Year to Date

1.9%

BRC Total Sales YoY

- Overall sales reflected a slight increase of 0.1% YoY, demonstrating that Kingston is still maintaining a favourable position, especially during the tough time retailers have been facing over the last 12 months.
- The Food & Beverage sector has consistently maintained positive sales throughout the year, which reinforces the message that consumers are still happy to venture out and spend money, but are looking for an experience.

MONTHLY CARS PARKED – DEC 19

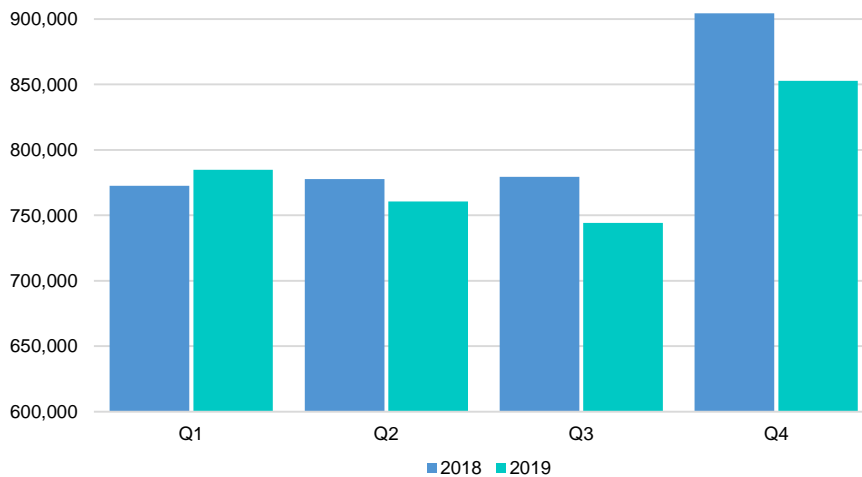


-8.3%
vs. previous year

-5.7%
Q4, Oct-Dec YoY

Graph reflects total number of cars parked in all town centre car parks.

CARS PARKED BY QUARTER



**2019 TOTAL
CARS PARKED**

3,142,684

-2.8%
vs. previous year

- Quarterly car parking figures for Kingston town centre have demonstrated a steady decline in users, again this could be due to a multitude of reasons from consumers choosing to shop online or use public transport as an alternative to driving into town.

KINGSTON TOWN CENTRE VACANCY RATE

Quarter	Kingston	UK Average	Greater London
Q1	No data	10.4%	7.3%
Q2	7.8%	10.3%	8.9%
Q3	9.5%	10.0%	6.0%
Q4	9.3%	9.8%	5.3%

- We have been collating town centre vacancy rate data as of Q2 in 2019, due to the visible changes in the nature of the High Street and the increase in town centre shop closures.
- The table above provides quarterly vacancy rates for our ground floor retail units, versus the UK average and Greater London for the past three quarters.
- We have seen a considerable increase in vacancies in Q3 v's Q2, however Q4 has remained steady compared to Q3 vacancies.

NEW OCCUPANCIES AND CLOSURES Q4, OCT – DEC 2019

	BUSINESS NAME	ADDRESS	CURRENT STATUS
OCTOBER	Picnic	The Rotunda	OPEN
	Pokie & Roll	Apple Market	OPEN
	Mia B	Crown Arcade	CLOSED
	Tommy Hilfiger	The Bentall Centre	RELOCATED
	Links of London	Market Place	CLOSED
NOVEMBER	Spirit of Amber	Crown Arcade	OPEN
	The Repair Station	Crown Arcade	OPEN
	NYX	The Bentall Centre	CLOSED
	Supercuts	The Bentall Centre	RELOCATED
DECEMBER	Anthropologie	Market Place	OPEN
	SWAG	The Bentall Centre	CLOSING
	Foot Locker	Clarence Street	OPEN
	Menkind	Clarence Street	OPEN
	Flight Centre	Market Place	OPEN
	Seriously Sofas	Crown Arcade	CLOSED
	Lebanon	Eden Street	CLOSED
	Kingston Escape Rooms	The Rotunda	OPEN
	Topman	Clarence Street	CLOSED

QUARTERLY BUSINESS CRIME SUMMARY

Q4, OCT – DEC 2019

THEFT SHOPLIFTING	2018	2019	YoY% CHANGE
OCTOBER	46	34	-26.1%
NOVEMBER	65	54	-16.9%
DECEMBER	33	47	42.4%
Q4 TOTAL	144	135	-6.25%

THEFT PERSON	2018	2019	YoY% CHANGE
OCTOBER	41	57	39%
NOVEMBER	33	38	15.1%
DECEMBER	43	36	-16.3%
Q4 TOTAL	117	131	11.9%

THEFT PEDAL CYCLE	2018	2019	YoY% CHANGE
OCTOBER	29	25	-13.8%
NOVEMBER	15	13	-13.3%
DECEMBER	16	16	0%
Q4 TOTAL	60	54	-10%

VIOLENCE AG. PERSON	2018	2019	YoY% CHANGE
OCTOBER	24	29	20.8%
NOVEMBER	17	20	17.6%
DECEMBER	43	32	-25.6%
Q4 TOTAL	84	81	-3.6%

*Includes Common Assault, ABH, GBH, Harassment Etc.

ANNUAL BUSINESS CRIME SUMMARY BY QUARTER

