



Retail Burn



This month, the most talked about retailers, according to SnapShop and the Retail Burn, include **M & S**, **Sainsbury's**, **Best Buy**, **ASDA**, **Harrods**, **House of Fraser**, **Waitrose**, **Superdrug**, **Amazon**, **Wickes**, **Starbucks**, **Thorntons**, **Waterstone's**, **Comet**, **Dixons Retail (DSG International)**, **John Lewis**, **HMV**, **Alworths**, **Mothercare** and **Focus**.

The retailer with the highest number of positive news articles in May was **M&S**. The store has unveiled re-vamped branding for its **Per Una** and **North Coast** sub-brands. The complete overhaul of its core collection will also include its name being abbreviated to **M&S** on labelling.

Focus has received the most negative press, with the much publicised news that the DIY retailer has fallen into administration.

Other notable stories include the news that **Mothercare** has plans to close as many as 121 of its shops in the UK, whilst **Wickes** has snapped up 13 **Focus** stores after the retailer fell into administration.

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Hot 100

The Hot 100 in May 2011 included;

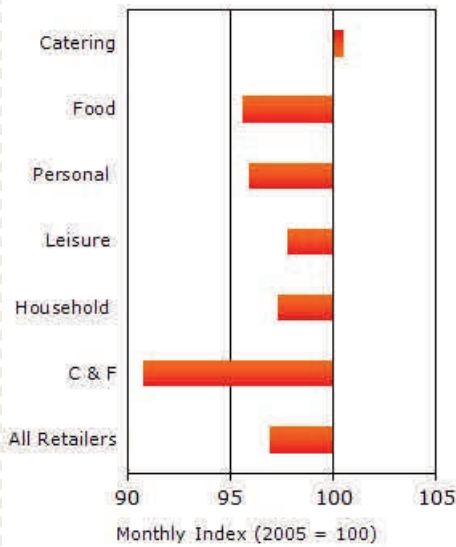
- International designer and retailer , **Paul Smith**
- Shoe store, **Clarks**
- Fashion retailer, **Republic**
- Young fashion brand, **Superdry**
- General pet store, **Jollies**
- Maternity and baby wear store, **JoJo Maman Bebe**
- Womenswear retailer, **Edinburgh Woollen Mill**
- Home entertainments business, **Martin Dawes**

These highly sustainable businesses have consistently delighted their loyal customers, have prudently managed their finances and have cautiously expanded, maintaining their appeal.

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RNI

May 2011



FSP's Retail News Index has increased (for the first time in four months) to 97 for all retailers in May 2011, an increase of 1 compared with March and April.

Overall news remains negative, however all indexes have either increased or remained the same this month. Catering remains the only index to reach over 100.

Leisure has jumped from 93 to 98, an increase of 10 since March.

Food and Clothing and Footwear both increased by 1 compared with April. Personal remained the same at 96 and Household saw an increase of 2 taking it back up to 97.

This month's slight increase in indexes may have been helped by the news that cotton prices have fallen, and positive news relating to the Easter sunshine which saw retailers experience increased sales.

FSP on average review over 350 unique items of retailer news. Each article is then scored according to sentiment. RNI is the sum of these scores indexed against 2005 and averaged over a three month period. The RNI time series for all retailers starts from May 2002.

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Financial Health of Retailers



The FSP Accounts Barometer monitors retailers' financial health.

In the year to December 2010 (the latest date to which accounts have been filed), the percentage of UK high street retailers deemed Healthy was 41%. PLCs are generally financially stronger, with 54% deemed Healthy.

This continuing trend appears to show the strong getting stronger whilst struggling retailers find themselves in difficulty.

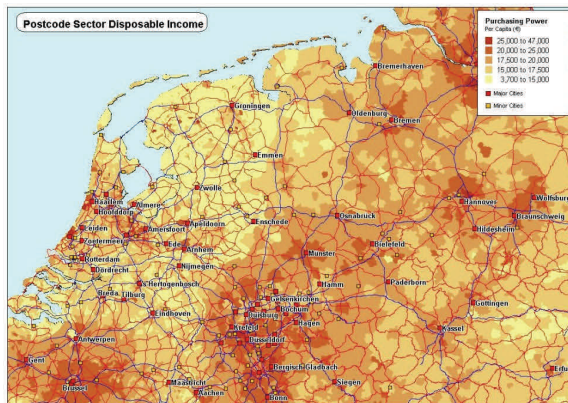
Most retailers which fail have been identified as being financially *Unhealthy* (Krisp Clothing, Oddbins, Signature Brands etc). Comet has had its 'Head above water' since 2009. Focus is an exception having been *Fairly Healthy* for the last two years.

SnapShop members can be notified when retailers on their Favourites List file accounts.

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Estimating Rent Sustainability

It is often difficult to find good quality intelligence to support overseas investments. As well as obvious language and cultural differences, census data can be inconsistent, catchment data unreliable and the standard of analysis by local research firms very mixed. These problems have led some players to dismiss the need for good quality research. There are well documented cases where the true potential of opportunities has been overlooked or where the scale of threat from competing locations has been missed. The results for investment value and growth have been disastrous. However, those investors who wish to have the same quality research for their European retail real estate as in the UK work with FSP .



FSP provides a full range of consultancy services for Europe. Over a decade of experience in more than 20 countries has established a wealth of knowledge on retail markets, local data and close links with specialist consumer research suppliers. This means FSP can assess market potential, establish trading performance and identify solutions for any location in Europe, using the same rigorous techniques which underpin our services in the UK.

Recent clients include Area Property Investors, Aviva Investors, Deutsche Bank, Henderson Global



Investors, King Sturge, NV Allfin and Rioja Developments. Recent projects span District Centres in France, Regional Malls in Ireland, Factory Outlet Centres in Hungary and mixed use sites in Estonia. Project types include:

- Catchment definition – using shopper surveys and drive times
- Consumer Research – bespoke shopper surveys, focus groups and mini depth interviews
- Trading Gap Assessment – analysis of catchment potential, shopper performance and trading data to prioritise opportunities to grow sales
- Leasing Support - turnover estimates, catchment demographics and spend, national / international benchmarking and tenant mix analysis to support leasing activity

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FSP Focus

Where necessary, outputs can be translated for use by local management and marketing teams and briefings arranged for joint owners and country offices.

There are many reasons to work with FSP in Europe, not least the ability to understand the brief, design the most cost effective approach and assemble the right team. Teamwork is also essential and where required, translated project findings are provided to ensure that outputs can be used by local stakeholders. The result is research which is commercially focussed, coherent, accurate, comprehensible, relevant, implementable and excellent value.



"I am very pleased to have given the approval to the research as this really does appear to me to be money well spent"

Robert Wood, Fund Manager - Continental European Real Estate, Aviva Investors

For more information or to talk to one of our consultants please contact FSP via e-mail fspretail@fspretail.co.uk or call 01494 474740.

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What is Retail Pulse?

Retail Pulse is a free monthly publication that highlights information available at www.fspretail.co.uk.

Helping clients make best use of their retail property is FSP's role, and although all property is location-specific, its best use is affected by industry-wide trends. FSP maintains unique measures of trends in UK retail property, and it's proven that monitoring existing trends improves the understanding of likely future ones.

FSP measures are focused on patterns in retail performance, and are therefore designed to supplement the standard property driven measures. Interpretation of all these data is the FSP business, [contact us](#) for information.

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