



## Retail Burn

### Waitrose

Tesco Stores UK  
 Debenhams  
 H&M  
 Uniqlo  
 John Lewis  
 ASOS  
 Co-operative Group  
 Ocado  
 Hobbycraft  
 TJ Hughes  
 Monsoon  
 Matalan  
 Kookai  
 Haldanes Stores  
 New Look  
 Jane Norman  
 Carpet Right  
 Life & Style



This month, the most talked about retailers, according to SnapShop and the Retail Burn, include [Waitrose](#), [Tesco Stores UK](#), [Debenhams](#), [H&M](#), [Uniqlo](#), [John Lewis](#), [ASOS](#), [Co-operative Group](#), [Ocado](#), [Hobbycraft](#), [TJ Hughes](#), [Monsoon](#), [Matalan](#), [Kookai](#), [Haldanes Stores](#), [New Look](#), [Jane Norman](#), [Carpetright](#), [Life & Style](#) and [Comet](#).

The retailer with the highest number of positive news articles in June was [Waitrose](#). The supermarket has announced it will be taking on Ocado in the London Market and has launched an on line push promoting its re-branded website and drawing attention to its high levels of customer service.

[Comet](#) has received the most negative press. After closing 17 of its stores parent Kesa confirmed the electrical retailer was up for sale.

Other notable stories include the news that [Jane Norman](#) has gone into administration, whilst [The Co-operative Group](#) has acquired three Netto Stores from Asda.

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## Hot 100



The Hot 100 in June 2011 included;

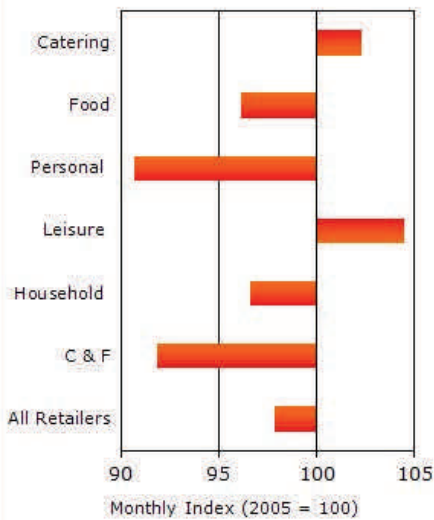
- DIY retailer, [Halfords](#)
- High end jewellery store, [Links of London](#)
- Specialist pet retailer, [Pets at Home](#)
- Fragrance store, [The Perfume Shop](#)
- Yorkshire based variety store, [The Original Factory Shop](#)
- Family fashion retailer, [Boden](#)
- Pizza delivery, [Domino's Pizza](#)
- Books, stationery, magazines & newspaper store, [WH Smiths](#)

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

June 2011



FSP's Retail News Index is a 3 month moving average measure of sentiment in reported retail news stories. The overall Index was slightly more positive in June than in May, up to 98 from 97.

All indices bar *Personal* have improved this month but most remain below 100, the 2005 benchmark. Only *Catering* and *Leisure* exceed 100. *Catering* increased by 1 to 102 and *Leisure* reached 104 with an increase of 6.

*Personal* fell 5 to 91 compared with 96 in May.

*Food*, *Household* and *Clothing & Footwear* all increased by 1 in June compared with May.

This month's index increases may be due to supermarkets and other retailers doing well even with a number of high profile administrations. The strong appear to be getting stronger whilst struggling retailers are falling rapidly.

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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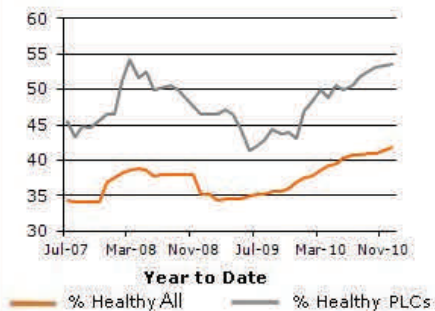
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## FAB

### Financial Health of Retailers



The FSP Accounts Barometer monitors retailers' financial health using the Wealth Creation Index pioneered by the DTI, now Department for Business, Innovation and Skills.

In the year to January 2011 (the latest date to which accounts have been filed), the percentage of all UK high street retailers deemed Healthy was 44%. PLCs are generally financially stronger, with 54% deemed Healthy.

The graph suggests that plc. wealth creation may be peaking slightly below the levels seen early in 2008. Amongst all retailers the trend continues upwards. Perhaps the strong are getting stronger even whilst struggling retailers face increasing difficulty.

Most retailers which fail have been identified as being financially *Vulnerable* (including *Krisp Clothing*, *Oddbins*, *Signature Brands*). The combination of Wealth Creation Index with a few other indicators is a good predictor of retailers likely to enter administration.

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

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# The Value of Satisfied Shoppers

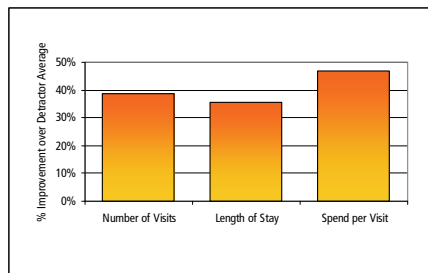
The satisfied shopper spends substantially more than the dissatisfied. Increasing shopper satisfaction can be more effective than recruiting new shoppers, however shoppers are becoming increasingly dissatisfied. FSP's analysis suggests decreased shopper satisfaction has resulted in a 2% decline in nationwide shopper expenditure.

*"The more the merrier"* is the motto of many shopping centres. The retail property industry seems obsessed with footfall statistics. It is assumed that more shoppers equal more sales. Increasing footfall is often made the marketing objective.

However, shrewd marketers recognise a better strategy. Selling additional product to existing customers is more lucrative and easier. This was the impulse behind the development of Tesco's Clubcard. Other retailers, Boots the Chemist and John Lewis for example, believe in *'delighting the customer'*. They combine good product with outstanding customer service.

How can shopping centres exploit this insight? Without access to turnover data, it's hard to quantify greater sales to existing customers. FSP has tackled this issue using the detailed consumer responses within its database of annual shopping centre consumer surveys (totalling over 50,000 respondents).

Using *Net Promoter Scores (NPS)*, FSP has identified the level of consumer satisfaction with shopping centres. NPS is based upon the balance between positive and negative responses to the question, *"Would you recommend this shopping centre to your friends and family?"*. By comparing *Promoters* (with a strongly positive response) with *Detractors* (with a strongly negative response) across a range of consistent shopping centre indicators, it is possible to identify whether significant differences in performance exist.



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For more information please contact us at [fspretail@fspretail.co.uk](mailto:fspretail@fspretail.co.uk) or call 01494 474740

## What is Retail Pulse?

Retail Pulse is a free monthly publication that highlights information available at [www.fspretail.co.uk](http://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.

FSP looks forward to welcoming you on stand 21 at [BCSC Conference & Exhibition 2011!](#) Don't miss the key seminar [Retail 2020 - How much space is enough?](#) on Tuesday 20th September 11.45-12.30pm, jointly hosted by FSP, Twentyretail & JLL.

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