



The Retail Pulse



FSP at BCSC
Manchester
9-11 November
Stand 7
Retail Expertise In Action

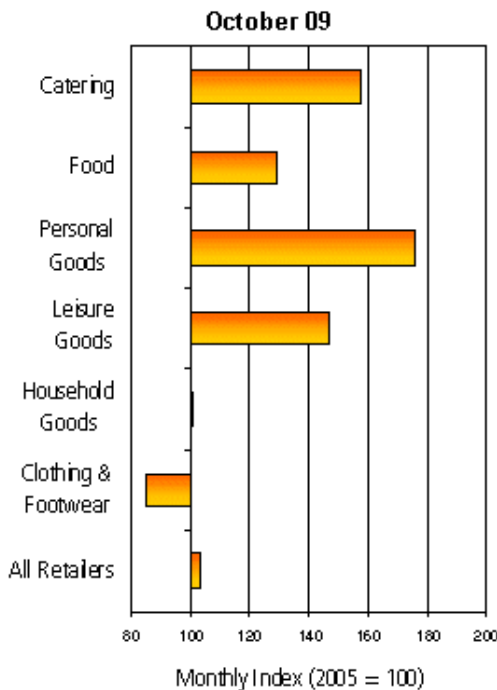
Hot 100

Retail News Index

Retail Burn

Accounts Barometer

Product Focus



RNI

The Retail News Index for October 2009 shows positive YoY changes against the 2005 base figure for all categories apart from Clothing and Footwear, however half of the categories posted YoY declines, the most significant being Leisure Goods, which fell 32.9% YoY.

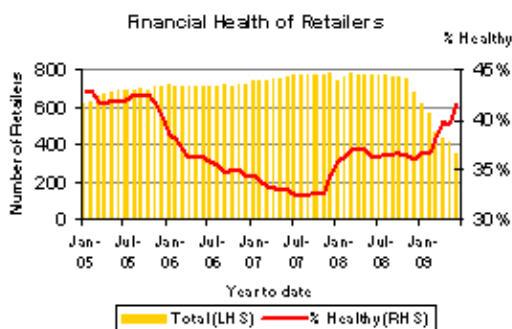
Overall, the index declined 63% YoY, bringing the October 2009 index to 103 points.

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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FAB

FSP's Accounts Barometer monitors retailers to assess their financial health. The latest data available are at June 2009, when the percentage of UK high street retailers deemed to be healthy was 42% - 2% higher than last month.

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Retail Burn

Blacks Leisure Group remain in the list of most negatively talked about retailers for October 2009, along with, unsurprisingly, O'Neill (though perhaps unfairly as O'Neill operate as a separate company from Sandcity!). French Connection's withdrawal from the Japanese market did them no favours with the press either, who reported store closures in several territories besides Japan, heavy losses and redundancies this month.

Burberry are new to Retail Burn this month, after seeing positive coverage of a successful run at London Fashion Week, the launch of a new Social Networking e-marketing initiative and posting a 6% increase in revenues for the latest half year.





Hot 100

FSP's Hot 100 Retailers for September 2009 include: Pets At Home, Paperchase, Gamestation, New Look, Pizza Express, Burberry, Republic, White Stuff, Primark, DFS, Wagamama, Clarks and River Island.

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

Product Focus - Tenant Mix Planning

Is your letting strategy driven by rental income or consumer demand?

An effective tenant mix strategy is essential to the success of your centre. It will enhance the shopper experience by providing wide choice and locating compatible shops within easy reach of each other.

Before the development of shopping centres multiple ownership of space failed the consumer miserably, with little planning of shop type or location and often a great many outlets crammed with similar products. With single ownership of retail facilities comes greater control over the consumer offering, as well as the ability to say 'no' to inappropriate tenants.

You don't need to rely on the Requirements List to determine which retailers to approach. It is the retail and catering mix of your shopping centre that will distinguish it from the competition and attract shoppers. With FSP's expertise, using shopper surveys, mini depth interviews and national information, both the market and the competition will be analysed in-depth and the findings used to plan a tenant mix that will optimise customer flow, increase retail sales and enable you to put in place rent structures acceptable both to you and your occupiers. If the retailers know what they are doing, your centre will be on their requirements list, if not, FSP expertise will demonstrate the reasons why it should be.

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.

Visit us at BCSC next week! Stand 7 9th - 11th November Retail Expertise In Action

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