



# The Retail Pulse

Retail News Index

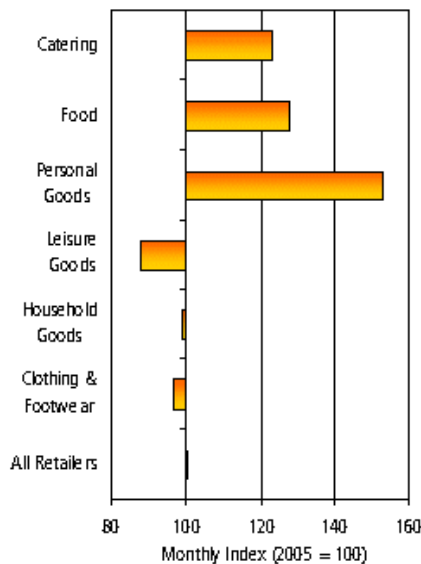
Accounts Barometer

Hot 100

Retail Burn

Product Focus

September 09

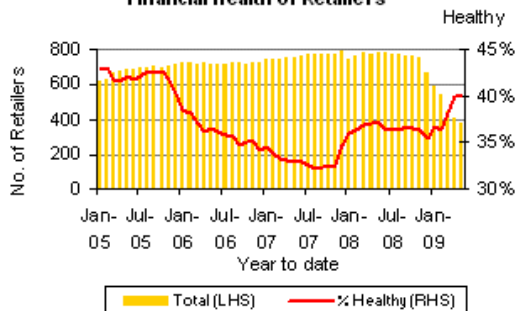


## RNI

The Retail News Index for September 2009 shows positive YoY changes for the Personal Goods, Food and Catering sectors and negative for Clothing & Footwear, Household and Leisure Goods. Across the board, the Index for September is slightly down on last month at 100 — a -6.5% YoY overall change.

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.

Financial Health of Retailers



## FAB

FSP's Accounts Barometer monitors retailers to assess their financial health.

The latest data available are at May 2009, when the percentage of UK high street retailers deemed to be healthy was 40% - 2% higher than last month.

## Retail Burn

September 2009 was a particularly harsh month in terms of negative press for some retailers, in particular Blacks Leisure Group and again, JJB. JJB Sports announced large losses for the first half of the year in mid-September and continue to suffer enquiries from official bodies - last month the Competition Commission, this month the Serious Fraud Office - while Blacks Leisure Group placed their boardwear division, Sandcity Ltd, in administration during September.

On the flip side, the supermarkets continue to remain in favour, with Asda, Sainsbury's and Morrisons featuring in the top 3 retailers this month.

Overall, just over half of recorded press articles during September were of a positive nature, however the 55% recorded this month represents a fall on the same measure for August, when 72% of all articles recorded were deemed positive.

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#### 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 - Leasing Support for Retail Parks

FSP's retail research expertise, combined with use of extensive databases, and hands on senior retail experience assists letting teams by presenting the profit opportunity to target retailers.

Advising you on all crucial issues relating to retail strategy, occupier performance, asset management and implementation, our expert team will:

- focus on opportunities to increase value
- identify target retailers to deliver increased sales/rent based on retailer fit
- provide data and benchmarking to present to retailers
- provide turnover and profit estimates for target retailers

With FSP, you will find clear, concise information for retailer recruitment.

Mark Phelps, Letting Agent with Wilkinson Williams said: *"The FSP research helped our understanding of the Park's shoppers and provided information that assisted our discussions with target retailers. The bespoke reports provide key benchmark statistics and quantify the profit opportunities to retailers. They also help illustrate to landlords the scope for future growth and can formulate part of an asset management strategy."*

#### Retailer Profile - New Look

Summary...

Since its foundation in 1969, New Look has grown to become one of the largest clothing chains across the UK. Typically orientated towards the Young Fashion market, additional lines include the 915 teenwear range, Inspire for sizes 16 plus, tall and maternity. In recent months, additional menswear concessions and boutique brands have been introduced, new formats trialled and focuses on online operations renewed, and all indications are that the chain will continue to go from strength to strength over the coming years.

In 2004, New Look reverted to private ownership after several successful years floatation on the London Stock Exchange, and in September 2009 it was reported that plans for a £1.7bn-plus stock market float were being drawn up. It will be interesting to see the reaction of the market to this proposed float amidst the continuing challenges of a Britain in recession

FSP's Retailer Profiles can be found in the Downloads section of [fspretail.co.uk](http://fspretail.co.uk) and typically include a map of areas traded, a company history timeline, financial health indicators and a selection of recent news headlines. Profiles are produced using information from [snapshop.co.uk](http://snapshop.co.uk), your one-stop retail intelligence service. Members of SnapShop receive the Retail Pulse and SnapShop Monthly newsletters free, direct to their inbox. For more information about Membership, [click here](#).

## 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.

Should Borders concentrate on rectifying their existing problems, or is moving out of the dwindling book market the only way they can survive? Let us know what you think by commenting on the SnapShop Blog!

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