

Penrith

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area

The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System

A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outlets with the UK average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of

a centre to local consumers: The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve the consumer appeal of a centre). The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets: While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian:

The Goad Category Reports

Category reports allow you to compare retail centres and breakdown the retail types to allow you to undertake detailed study.

The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial / Business Services and Vacancy sectors.

Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area.

The Goad Catchment Profile

This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.

Mosaic classifies individuals using census, financial, housing and retail data. Combining this with the profile's information on local household composition and age structure enables you to understand the varied lifestyles and behaviours of individual customers. You can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and generate greater brand loyalty.

Retail Planner

Retail Planner delivers clear, comprehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:

- Estimate future spending on retail goods and leisure services
- Identify changes in the efficiency of retail floor space
- Explain past trends and forecast business turnover potential
- Demonstrate retail planning knowledge to your clients

Goad Network

A Goad plan provides a bird's-eye view of a retail centre, illustrating the fascia name, retail category, floor space and exact location of all retail outlets and vacant premises. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing

you to instantly assess the site quality of existing or prospective store locations in an easy to use Goad Network internet service.

Access the service at

<http://www.goadnetwork.co.uk>

Historic Plans

Historic Goad plans dating back to 1968 are available for you to compare retail mix over a period of time and are ideal for supporting planning and consultancy services. Plans surveyed after 1999 are also available in a digital format and can be uploaded to your Goad Network service, allowing you to make online comparisons.

Bespoke Goads

Our Cartography team can produce paper or PDF copies of Goad plans that identify Use Class, floor space variations and can display client data in a variety of mediums. Gap Analysis of multiple Goad plans can be presented in a clear visual manner, which allows clients to run comparisons of neighbouring locations

Demographics Online

DOL is the one stop shop for organisations requiring a quick, clear and actionable source of on-line demographic data that helps clients analyse existing and potential retail locations. Our DOL service provides clients with access to UK census data, and award winning market segmentation data in simple, easy to read, local area information reports specified by you. The report packs include sections on population statistics, age analysis, employment data and many others. The interactive mapping section allows you to map drive-times around your locations and view your customers. Our off the shelf reports include maps, charts and tables to help your understanding; or tailor the data to meet your own requirements. Subscription is for a year and usage is unlimited!

Shop Point

Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Database, Experian's National Business Database, Catalist and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The data set includes over 30 pieces of retail information including: Fascia, address, floor space and co-ordinates.

For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:

Tel: 0845 601 6011

Fax: 0115 968 5003

E-mail: goad.sales@uk.experian.com

Penrith



Survey Date: 08-Apr-13

Closest Centres	Distance (km)
Appleby-in-Westmorland	19.4
Keswick	25.7
Alston	26.0
Carlisle	28.0
Ambleside	29.2

Key Retail Indicators

Total Outlets	271			
Total Floorspace (sqft)	440,100			
Vacant Outlets	Count	%	% UK	Index
	24	8.86	12.60	70
Vacant Floorspace (sq ft)	25,400	5.77	10.70	54
Multiple Outlets	58	21.40	29.21	73
Comparison Outlets	129	47.60	40.91	116

Major Retailers

Argos	1	Next	0
BhS	0	O2	1
Boots The Chemist	1	Phones 4 U	0
Burton	1	Primark	0
Carphone Warehouse	1	River Island	0
Clarks	1	Sainsburys	1
Clintons	0	Superdrug	1
Debenhams	0	T K Maxx	0
Dorothy Perkins	1	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WHSmith	1
		Wilkinsons	0

Retail Composition

Retail Trade Group	Outlets				Index	Floorspace				Index
	Number	%	% UK	Index		sq.ft	sq.m	%	% UK	
Convenience	28	10.33	8.81	117		165,500	15,375	37.61	17.79	211
Comparison	129	47.60	40.91	116		153,900	14,298	34.97	46.02	76
Service	87	32.10	36.52	88		87,600	8,138	19.90	24.46	81
Vacant	24	8.86	12.60	70		25,400	2,360	5.77	10.70	54
Multiple Retailers by Trade Group										
Convenience	8	13.79	12.00	115		131,100	12,180	60.89	25.42	240
Comparison	32	55.17	52.52	105		54,400	5,054	25.27	54.18	47
Service	16	27.59	33.04	83		22,700	2,109	10.54	19.05	55
Miscellaneous	2	3.45	2.43	142		7,100	660	3.30	1.35	245
Retail Category										
Convenience	28	10.33	8.81	117		165,500	15,375	37.61	17.79	211
Bakers	10	3.69	2.18	169		9,600	892	2.18	1.10	198
Butchers	3	1.11	0.77	144		1,900	177	0.43	0.41	105
Greengrocers & fishmongers	2	0.74	0.62	119		1,200	111	0.27	1.33	21
Groceries & frozen foods	9	3.32	2.92	114		125,700	11,678	28.56	12.77	224
Off licences & home brew	2	0.74	0.51	146		1,500	139	0.34	0.31	111
CTN & convenience	2	0.74	1.81	41		25,600	2,378	5.82	1.87	312
Comparison	129	47.60	40.91	116		153,900	14,298	34.97	46.02	76
Footwear & repairs	6	2.21	1.80	123		5,600	520	1.27	1.29	98
Mens, boys wear	3	1.11	1.00	111		3,300	307	0.75	0.88	85
Womens, girls & childrens clothing	4	1.48	3.65	40		4,700	437	1.07	3.54	30
Mixed & general clothing	13	4.80	3.97	121		13,300	1,236	3.02	6.31	48
Furniture, carpets, textiles	11	4.06	3.38	120		19,000	1,765	4.32	3.76	115
Books, arts/crafts, stationers/copy	16	5.90	4.38	135		13,500	1,254	3.07	3.17	97
Elec, home ent, 'phones & video	16	5.90	3.82	155		14,100	1,310	3.20	2.87	112
DIY, hardware & household goods	7	2.58	2.50	103		17,000	1,579	3.86	4.87	79
Gifts, china, glass & leather goods	10	3.69	1.64	226		10,900	1,013	2.48	0.88	281
Cars, motor cycles & accessories	1	0.37	1.18	31		1,300	121	0.30	1.82	16
Chemists, toiletries & opticians	9	3.32	3.88	86		14,700	1,366	3.34	3.91	85
Variety, department & catalogue	1	0.37	0.59	62		6,300	585	1.43	6.25	23
Florists & gardens	4	1.48	0.89	166		2,700	251	0.61	0.41	150
Sports, toys, cycles & hobbies	9	3.32	2.06	162		12,700	1,180	2.89	2.23	129
Jewellers, clocks & repairs	4	1.48	1.99	74		2,500	232	0.57	0.91	63
Charity, pets & other comparison	15	5.54	4.18	132		12,300	1,143	2.79	2.93	96
Service	87	32.10	36.52	88		87,600	8,138	19.90	24.46	81
Restaurants, cafes, fast food	36	13.28	16.39	81		40,600	3,772	9.23	11.79	78
Hairdressing, beauty & health	25	9.23	9.39	98		18,000	1,672	4.09	4.50	91
Launderettes & dry cleaners	1	0.37	0.92	40		1,500	139	0.34	0.42	82
Travel agents	4	1.48	1.14	129		2,100	195	0.48	0.70	69
Banks & financial services	9	3.32	4.25	78		11,800	1,096	2.68	4.44	60
Building societies	4	1.48	0.58	255		6,000	557	1.36	0.48	286
Estate agents & auctioneers	8	2.95	3.85	77		7,600	706	1.73	2.14	81
Miscellaneous	27	9.96	13.76	72		33,100	3,075	7.52	11.73	64
Employment, careers, POs & info	3	1.11	1.16	96		7,700	715	1.75	1.03	169
Vacant	24	8.86	12.60	70		25,400	2,360	5.77	10.70	54

For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

TERMS AND CONDITIONS

1. DEFINITIONS

"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.

"Experian" means Experian Group Limited.

"the Client" means the person, firm or limited company to whom the Services are to be provided.

"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.

"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.

"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS

Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES

3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.

3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.

3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.

3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES

4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.

4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.

4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY

Notwithstanding anything to the contrary contained in this Agreement:

5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.

5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT

Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY

7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.

7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.

7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)

7.3.1 the Information; and/or

7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or

7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.

7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:

7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction

7.4.2 it has already come within the public domain

7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY

The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises from the default of Experian.

9. DATA PROTECTION ACT 1984

The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION

10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:

10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE

Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT

The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER

Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS

This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understanding or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE

Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.

15.1 if given by mail seventy-two hours after the same shall have been despatched and 15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE

This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW

This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.