

Retail Locations & Shopping Centres

A scientific approach to location analysis in the retail sector



"Javelin Group is central to the success of strategic and operational space planning at BAA. Robin and the team bring an ability to convert business scenarios and diverse data sets into a smooth modelling process that combines all the key commercial drivers of our business. They deliver clear, practical outputs for our strategic plan."

Matt Titterton, Customer Insight Manager, BAA.

Retail locations and shopping centre strategy

A scientific approach to location analysis in the retail sector

One of Javelin Group's key service lines is to help retailers and shopping centre developers to optimise their investments in retail property. For retailers, we advise on how to match the right types of store with the right venues to maximise sales and profit returns. For shopping centre developers, owners and agents, we advise on the viability of new schemes and on how to optimise rental revenues through improved tenant mix. With over 20 years' experience our team goes well beyond the traditional scope of locations analysis, combining and analysing data from a wide variety of sources (including our own proprietary databases) to deliver high-quality, fact-based evaluations of store portfolios and shopping centres.

Together, we have delivered location strategy work for over 100 leading retailers and over 150 shopping centre developments.

1 Retailer location planning

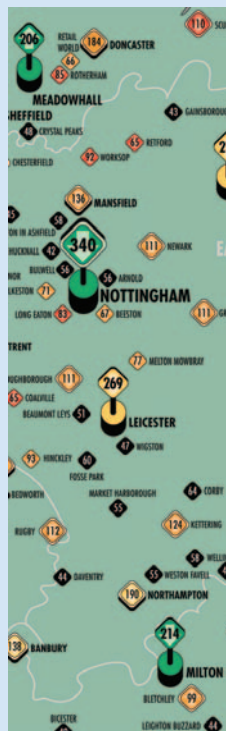
- Catchment analysis
- Store performance drivers
- Sales and profit forecasts in new venues
- Roll-out strategy
- Store portfolio investment prioritisation
- Optimal local ranging
- International expansion
- Due diligence of management plans

2 Location benchmarking

- Retail venue rankings in UK and Europe
- Retailer performance benchmarking
- Shopper typology

3 Shopping centre strategy

- Commercial feasibility of new and extended schemes
- Optimised tenant mix
- Sales potential and sustainable rents
- Pre-acquisition due diligence



Robin Bevan, Director
Retail Locations & Shopping Centres
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Robin runs our Retail Locations & Shopping Centres practice, having worked across Europe in all retail sectors for a variety of retailers, leading brands and shopping centre owners/developers. His 20 years' experience encompasses all aspects of retail property investment including roll-out strategies, refurbishment planning, local range optimisation, market entry, geographic channel strategies and shopping centre feasibility studies. Prior to joining Javelin Group, Robin was CEO of Management Horizons Europe. His client experience includes Sony, Pets At Home, Carphone Warehouse, New Look, Nike, Hammerson, Lend Lease, BAA, Gresham Private Equity and Goldman Sachs. Robin is an active member of the Education & Research Board of the British Council of Shopping Centres.

“Javelin Group made sense of how our business trades and used this to produce a compelling list of potential venues. We are now currently seeking roll-out opportunities using their recommendations to help us open the right stores in the right venues.”

Neil Clifford, Managing Director, Kurt Geiger.

Retailer locations



1 Retailer location planning

Javelin Group’s locations team brings a unique understanding of retail venues in Europe. This allows us to assess the store performance dynamics and roll-out potential of retail businesses of all sizes trading in all sectors (fashion, beauty, leisure goods, bulky goods, foodservice etc) and all venue types (high streets, malls, retail parks, transport hubs, mixed use).

Our work helps retailers to open the right stores (size, pitch) in the right venues, to maximise sales and profit return.

SELECTED LOCATION STRATEGY CLIENTS		
• Adams Kids	• Ihr Platz	• Salvatore Ferragamo
• Asda	• Kurt Geiger	• Schuh
• Bathstore	• M&S	• Screwfix
• Carphone Warehouse	• Maplin	• Sia
• Demon Tweeks	• Mothercare	• Sony Centres
• Elvi	• Mountain Warehouse	• Street One
• Evans Cycles	• New Look	• Thiele
• Faith	• Nike	• TK Maxx
• Fenwick	• Pets at Home	• USC
• Floors 2 Go	• Phase Eight	• West Cornwall Pasty Co.
• Habitat	• Rigby & Peller	• Woolworths

2 Location benchmarking

Our understanding of retail locations is informed by a range of proprietary data sets. VENUESCORE ranks retail venues across all major European countries. SHOPSCORE provides participating retailers with a unique mechanism for benchmarking store performance in the UK and Ireland. CONSUMERSCORE provides a demographic lifestyle profile of UK consumers based on key drivers determining their choice of shopping location, format, and channel.

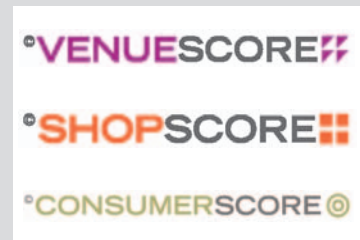
We combine these data sets with relevant external market and demographic data to gain a 360° perspective of shopping patterns and venues in the UK and Europe.



Alex Evered

Consulting Manager, Retail Locations
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Alex is a consulting manager in our Retail Locations & Shopping Centre practice, advising clients on their store location strategies. He has extensive retail sector experience, especially in economic modelling and strategic investment research in the retail property sector. Prior to joining Javelin Group he was with Pragma Consulting, DTZ’s European Consulting Division and Sainsbury’s location planning team.



“Javelin Group helped us to define the key parameters of the scheme – its catchment, optimum scale of development, tenant strategy, sales potential and sustainable rents. Their input has added real value.”

Lawrence Hutchings, Director of Property - Shopping Centres, Henderson Global Investors.

Shopping centres

3 Shopping centre strategy

Our location specialists harness Javelin Group's deep retail sector expertise to advise on retail-led property developments across Europe. Our team has advised on over 150 schemes including many well-known developments such as Bluewater, Athens Mall, Buchanan Galleries, Bullring, Oberhausen and Parly 2. Our strength lies in our unrivalled understanding of retail and its performance metrics (local market spending, catchments, trading densities, sustainable rents), and in our use of robust analytical tools to deliver a comprehensive assessment of the commercial trading potential and optimum tenant mix for shopping centres, both planned and existing.

SELECTED SHOPPING CENTRE DEVELOPER/OWNER CLIENTS

- | | | |
|---------------------------|---------------------|--------------------------|
| • Arlington Property Inv. | • Hammerson | • Minerva |
| • BAA | • Hark Retail | • Morley Fund Management |
| • Ballymore Properties | • Henderson G.I. | • Mountbrook Homes |
| • B'ham/Bristol Alliances | • Lamda Development | • Multiplex |
| • British Land | • Land Securities | • Network Rail |
| • Centros Miller | • Legal & General | • Sonae Sierra |
| • David McLean Dev. | • Lend Lease | • St Modwen |
| • Development Securities | • McArthurGlen | • Tesco |
| • Edward Holdings | • Meyer Bergman | • Wilson Bowden |

SELECTED SHOPPING CENTRE DEVELOPMENTS

- | | | |
|---------------------------|----------------------------|----------------------------|
| • Ashton-u-Lyne, Arcades | • Dublin, Ballsbridge | • Milton Keynes |
| • Athens, Athens Mall | • Dublin, Bray | • Newbridge, Whitewater |
| • Athlone, Town Centre | • Edinburgh, St James | • Paris, Franconville |
| • Bath, Southgate | • Elche, L'Aljub | • Portsmouth, N. Quarter |
| • Birmingham, Bullring | • Galway, Ceannt Quarter | • Preston, Tithebarn |
| • B'ham, Martineau Gall. | • Genova, Fiumara | • Reading, The Oracle |
| • Bridgewater, The Outlet | • Glasgow, Buchanan Gall. | • Saint Quentin, SQY Ouest |
| • Bristol, Cabot Circus | • Heathrow Airport | • Southampton, West Quay |
| • Bury St Edmunds, Arc | • Hull, Quay West | • Stockport, Bridgefield |
| • Canterbury, Whitefriars | • Leeds, Eastgate/Harewood | • Telford, Shopping Centre |
| • Chelmsford, Meadows | • Leicester, Highcross | • Thessaloniki, Pylea |
| • Crete, New Centre | • London, Brent Cross | • Warrington, Golden Sq. |
| • Croydon, Park Place | • London, White City | • Waterford, First City |



Andrew Leung

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Andrew is an associate director in our Locations & Shopping Centres practice. He has worked in the retail property sector since 1999 and has experience of projects in the UK, Greece, Spain, Denmark, Portugal, Poland, France, Italy and Ireland. Andrew has worked on projects for many blue-chip property clients such as Hammerson, Lend Lease, Centros Miller and British Land. Prior to joining Javelin Group, Andrew worked at Management Horizons Europe.

“Javelin Group’s work helps Hammerson to make key strategic decisions across both our existing shopping centre portfolio and future developments by providing objective and realistic research support. We have no hesitation in recommending them.”

Shelia King, Director of Leasing, Hammerson.

About Javelin Group

Europe’s leading specialist retail consultancy

Javelin Group is Europe’s leading firm of retail and ecommerce consultants. Our clients include many of the regions largest retailers and brands, together with smaller fast-growing businesses. They choose us for our specialist expertise across all of the key retail disciplines in each retail channel.

Our consulting services include retail strategy, retail operations, multi-channel retail and ecommerce, retail technology, due diligence and retail locations and shopping centres, all supported and informed by our detailed research into consumers, retailer innovation, and shopping venues.



Javelin Group’s six service lines



Selected Javelin Group clients



Sir Geoff Mulcahy, Chairman

Sir Geoff Mulcahy is widely considered one of Europe’s most successful retail strategists. As Javelin Group’s chairman, he provides strategic guidance and assists in setting the direction for our growth. Previously, he spent 20 years as CEO of Kingfisher plc, growing it into one of the largest non-food retailers in Europe including Woolworths, Comet/KESA, B&Q and Superdrug.



Tony Stockil, CEO

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Since founding Javelin Group, Tony Stockil has managed a wide range of projects for some of the UK’s leading retailers, with a primary focus on strategy and multi-channel retailing. He has worked in the retail sector for many years, has an MBA from Harvard Business School and a background in venture capital and corporate strategy.

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