APPENDIX B

Goad Town Centre Reports

goad Centre Report

Gloucester

Experian™ A world of insight

(C) Experian 2009 Navteq 2008

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.

.

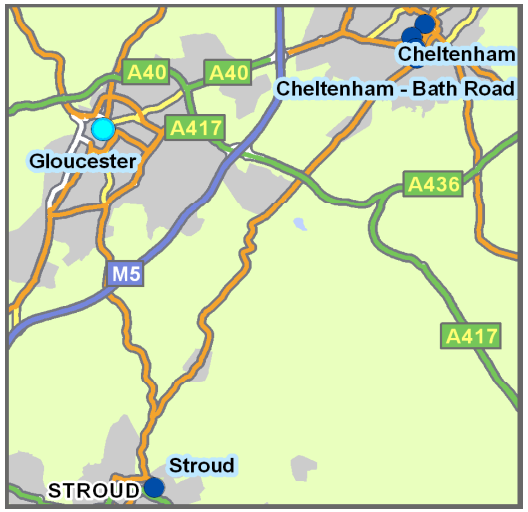
For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:
Tel: 0845 601 6011
Fax: 0115 968 5003

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

Experian™
A world of insight

(C) Experian 2009 Navteq 2008

Gloucester



Survey Date: 10-Aug-10

Closest Centres	Distance (km)
Cheltenham - Bath Road	11.6
Cheltenham - Montpellier Stree	11.6
Cheltenham - Suffolk Road	11.7
Cheltenham	12.3
Stroud	13.4

Key Retail Indicators

Total Outlets	**481**
Total Floorspace (sq ft)	**1,306,300**

	Count	%	% UK	Index
Vacant Outlets	101	21.00	12.92	163
Vacant Floorspace (sq ft)	313,700	24.01	11.26	213
Multiple Outlets	168	34.93	30.49	115
Comparison Outlets	189	39.29	41.89	94

Major Retailers

Argos	1	Next	0
BhS	1	O2	1
Boots The Chemist	1	Phones 4 U	1
Burton	1	Primark	1
Carphone Warehouse	1	River Island	1
Clarks	1	Sainsburys	1
Clintons	2	Superdrug	1
Debenhams	1	T K Maxx	0
Dorothy Perkins	1	Tesco	0
H & M	1	Topman	0
H M V	1	Topshop	1
House of Fraser	0	Vodafone	1
John Lewis	0	Waitrose	0
Marks & Spencer	2	Waterstones	1
New Look	1	WHSmith	1
		Wilkinsons	1

Scroll for individual categories

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	33	6.86	9.23	74	188,600	17,522	14.44	17.35	83
Comparison	189	39.29	41.89	94	539,100	50,084	41.27	47.35	87
Service	148	30.77	34.78	88	245,800	22,836	18.82	23.05	82
Vacant	101	21.00	12.92	163	313,700	29,144	24.01	11.26	213
Multiple Retailers by Trade Group									
Convenience	12	7.14	12.13	59	150,000	13,935	21.09	24.60	86
Comparison	100	59.52	53.69	111	402,300	37,375	56.55	56.04	101
Service	53	31.55	31.98	99	149,800	13,917	21.06	18.14	116
Miscellaneous	3	1.79	2.20	81	9,300	864	1.31	1.22	107
Retail Category									
Convenience	**33**	**6.86**	**9.23**	**74**	**188,600**	**17,522**	**14.44**	**17.35**	**83**
Bakers	10	2.08	1.98	105	7,800	725	0.60	1.01	59
Butchers	0	0.00	0.82	0	0	0	0.00	0.44	0
Greengrocers & fishmongers	3	0.62	0.65	96	21,300	1,979	1.63	1.31	125
Groceries & frozen foods	12	2.49	2.92	85	150,400	13,973	11.51	12.38	93
Off licences & home brew	1	0.21	0.61	34	900	84	0.07	0.39	18
CTN & convenience	7	1.46	2.24	65	8,200	762	0.63	1.82	35
Comparison	**189**	**39.29**	**41.89**	**94**	**539,100**	**50,084**	**41.27**	**47.35**	**87**
Footwear & repairs	12	2.49	1.92	130	18,200	1,691	1.39	1.36	103
Mens, boys wear	10	2.08	1.02	204	12,000	1,115	0.92	0.88	104
Womens, girls & childrens clothing	22	4.57	4.82	95	52,900	4,915	4.05	4.17	97
Mixed & general clothing	14	2.91	3.50	83	58,500	5,435	4.48	6.13	73
Furniture, carpets, textiles	8	1.66	3.66	46	33,200	3,084	2.54	4.13	62
Books, arts/crafts, stationers/copy	16	3.33	4.07	82	29,400	2,731	2.25	3.14	72
Elec, home ent, 'phones & video	24	4.99	4.04	123	44,200	4,106	3.38	3.19	106
DIY, hardware & household goods	3	0.62	2.49	25	36,300	3,372	2.78	4.53	61
Gifts, china, glass & leather goods	7	1.46	1.62	90	5,800	539	0.44	0.88	51
Cars, motor cycles & accessories	2	0.42	1.29	32	7,200	669	0.55	1.99	28
Chemists, toiletries & opticians	14	2.91	3.91	75	35,600	3,307	2.73	3.95	69
Variety, department & catalogue	5	1.04	0.63	166	119,900	11,139	9.18	6.65	138
Florists & gardens	2	0.42	0.99	42	1,300	121	0.10	0.45	22
Sports, toys, cycles & hobbies	16	3.33	2.21	151	35,000	3,252	2.68	2.44	110
Jewellers, clocks & repairs	16	3.33	2.07	160	12,700	1,180	0.97	0.94	103
Charity, pets & other comparison	18	3.74	3.67	102	36,900	3,428	2.82	2.52	112
Service	**148**	**30.77**	**34.78**	**88**	**245,800**	**22,836**	**18.82**	**23.05**	**82**
Restaurants, cafes, fast food	65	13.51	15.70	86	102,700	9,541	7.86	10.79	73
Hairdressing, beauty & health	38	7.90	8.20	96	38,600	3,586	2.95	3.91	76
Launderettes & dry cleaners	3	0.62	0.98	63	3,300	307	0.25	0.46	55
Travel agents	4	0.83	1.29	64	5,900	548	0.45	0.77	59
Banks & financial services	20	4.16	4.19	99	67,800	6,299	5.19	4.51	115
Building societies	4	0.83	0.59	141	8,200	762	0.63	0.49	129
Estate agents & auctioneers	14	2.91	3.83	76	19,300	1,793	1.48	2.13	69
Miscellaneous	**111**	**23.08**	**14.10**	**164**	**332,800**	**30,918**	**25.48**	**12.25**	**208**
Employment, careers, POs & info	10	2.08	1.18	176	19,100	1,774	1.46	0.99	148
Vacant	101	21.00	12.92	163	313,700	29,144	24.01	11.26	213

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

(C) Experian 2009 Navteq 2008

goad Centre Report

Cheltenham

Experian™ A world of insight

(C) Experian 2009 Navteq 2008

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

Experian™
A world of insight

(C) Experian 2009 Navteq 2008

Cheltenham

Survey Date: 15-Oct-09

Closest Centres	Distance (km)
Cheltenham - Montpellier Stree	0.7
Cheltenham - Suffolk Road	1.0
Cheltenham - Bath Road	1.3
Winchcombe	9.6
Tewkesbury	11.8

Key Retail Indicators

Total Outlets	**666**
Total Floorspace (sq ft)	**1,519,300**

	Count	%	% UK	Index
Vacant Outlets	100	15.02	12.92	116
Vacant Floorspace (sq ft)	215,400	14.18	11.26	126
Multiple Outlets	271	40.69	30.49	133
Comparison Outlets	306	45.95	41.89	110

Major Retailers

Argos	1	Next	1
BhS	1	O2	1
Boots The Chemist	1	Phones 4 U	1
Burton	1	Primark	1
Carphone Warehouse	2	River Island	1
Clarks	1	Sainsburys	0
Clintons	2	Superdrug	1
Debenhams	1	T K Maxx	1
Dorothy Perkins	1	Tesco	1
H & M	0	Topman	0
H M V	1	Topshop	1
House of Fraser	1	Vodafone	1
John Lewis	0	Waitrose	0
Marks & Spencer	1	Waterstones	1
New Look	1	WHSmith	1
		Wilkinsons	1

Click for individual categories

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	35	5.26	9.23	57	78,100	7,256	5.14	17.35	30
Comparison	306	45.95	41.89	110	856,900	79,609	56.40	47.35	119
Service	212	31.83	34.78	92	351,700	32,674	23.15	23.05	100
Vacant	100	15.02	12.92	116	215,400	20,011	14.18	11.26	126
Multiple Retailers by Trade Group									
Convenience	17	6.27	12.13	52	57,800	5,370	6.08	24.60	25
Comparison	171	63.10	53.69	118	694,000	64,475	73.01	56.04	130
Service	75	27.68	31.98	87	188,000	17,466	19.78	18.14	109
Miscellaneous	8	2.95	2.20	134	10,700	994	1.13	1.22	92
Retail Category									
Convenience	**35**	**5.26**	**9.23**	**57**	**78,100**	**7,256**	**5.14**	**17.35**	**30**
Bakers	8	1.20	1.98	61	7,200	669	0.47	1.01	47
Butchers	1	0.15	0.82	18	700	65	0.05	0.44	10
Greengrocers & fishmongers	1	0.15	0.65	23	1,400	130	0.09	1.31	7
Groceries & frozen foods	14	2.10	2.92	72	57,500	5,342	3.78	12.38	31
Off licences & home brew	3	0.45	0.61	73	5,500	511	0.36	0.39	93
CTN & convenience	8	1.20	2.24	54	5,800	539	0.38	1.82	21
Comparison	**306**	**45.95**	**41.89**	**110**	**856,900**	**79,609**	**56.40**	**47.35**	**119**
Footwear & repairs	15	2.25	1.92	117	17,000	1,579	1.12	1.36	83
Mens, boys wear	8	1.20	1.02	118	12,500	1,161	0.82	0.88	93
Womens, girls & childrens clothing	50	7.51	4.82	156	85,700	7,962	5.64	4.17	135
Mixed & general clothing	32	4.80	3.50	137	116,300	10,805	7.65	6.13	125
Furniture, carpets, textiles	29	4.35	3.66	119	98,600	9,160	6.49	4.13	157
Books, arts/crafts, stationers/copy	22	3.30	4.07	81	40,200	3,735	2.65	3.14	84
Elec, home ent, 'phones & video	36	5.41	4.04	134	60,500	5,621	3.98	3.19	125
DIY, hardware & household goods	5	0.75	2.49	30	26,800	2,490	1.76	4.53	39
Gifts, china, glass & leather goods	9	1.35	1.62	84	11,200	1,041	0.74	0.88	84
Cars, motor cycles & accessories	3	0.45	1.29	35	6,200	576	0.41	1.99	20
Chemists, toiletries & opticians	23	3.45	3.91	88	55,600	5,165	3.66	3.95	93
Variety, department & catalogue	6	0.90	0.63	144	239,900	22,287	15.79	6.65	238
Florists & gardens	1	0.15	0.99	15	300	28	0.02	0.45	4
Sports, toys, cycles & hobbies	20	3.00	2.21	136	46,500	4,320	3.06	2.44	126
Jewellers, clocks & repairs	24	3.60	2.07	174	17,300	1,607	1.14	0.94	121
Charity, pets & other comparison	23	3.45	3.67	94	22,300	2,072	1.47	2.52	58
Service	**212**	**31.83**	**34.78**	**92**	**351,700**	**32,674**	**23.15**	**23.05**	**100**
Restaurants, cafes, fast food	105	15.77	15.70	100	161,900	15,041	10.66	10.79	99
Hairdressing, beauty & health	50	7.51	8.20	92	76,900	7,144	5.06	3.91	130
Launderettes & dry cleaners	2	0.30	0.98	31	1,600	149	0.11	0.46	23
Travel agents	7	1.05	1.29	81	8,800	818	0.58	0.77	75
Banks & financial services	18	2.70	4.19	65	57,800	5,370	3.80	4.51	84
Building societies	5	0.75	0.59	127	7,000	650	0.46	0.49	94
Estate agents & auctioneers	25	3.75	3.83	98	37,700	3,502	2.48	2.13	117
Miscellaneous	**113**	**16.97**	**14.10**	**120**	**232,600**	**21,609**	**15.31**	**12.25**	**125**
Employment, careers, POs & info	13	1.95	1.18	165	17,200	1,598	1.13	0.99	115
Vacant	100	15.02	12.92	116	215,400	20,011	14.18	11.26	126

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

(C) Experian 2009 Navteq 2008

goad Centre Report

Tewkesbury

Experian™ A world of insight

(C) Experian 2009 Navteq 2008

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

Experian™
A world of insight

(C) Experian 2009 Navteq 2008

Tewkesbury

goad Centre Report

Survey Date: 28-Oct-09

Closest Centres	Distance (km)
Upton upon Severn	8.8
Cheltenham	11.8
Cheltenham - Montpellier Stree	12.0
Cheltenham - Suffolk Road	12.5
Cheltenham - Bath Road	12.8

Key Retail Indicators

Total Outlets	**191**
Total Floorspace (sq ft)	**288,100**

	Count	%	% UK	Index
Vacant Outlets	26	13.61	12.92	105
Vacant Floorspace (sq ft)	30,900	10.73	11.26	95
Multiple Outlets	52	27.23	30.49	89
Comparison Outlets	80	41.88	41.89	100

Major Retailers

Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	1	Phones 4 U	1
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	1	Superdrug	1
Debenhams	0	T K Maxx	0
Dorothy Perkins	1	Tesco	1
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

Click for individual categories

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	17	8.90	9.23	96	48,000	4,459	16.66	17.35	96
Comparison	80	41.88	41.89	100	127,600	11,854	44.29	47.35	94
Service	63	32.98	34.78	95	76,300	7,088	26.48	23.05	115
Vacant	26	13.61	12.92	105	30,900	2,871	10.73	11.26	95
Multiple Retailers by Trade Group									
Convenience	7	13.46	12.13	111	31,600	2,936	27.01	24.60	110
Comparison	30	57.69	53.69	107	59,700	5,546	51.03	56.04	91
Service	13	25.00	31.98	78	23,500	2,183	20.09	18.14	111
Miscellaneous	2	3.85	2.20	175	2,200	204	1.88	1.22	154
Retail Category									
Convenience	**17**	**8.90**	**9.23**	**96**	**48,000**	**4,459**	**16.66**	**17.35**	**96**
Bakers	4	2.09	1.98	106	4,700	437	1.63	1.01	162
Butchers	2	1.05	0.82	128	6,000	557	2.08	0.44	472
Greengrocers & fishmongers	2	1.05	0.65	160	2,600	242	0.90	1.31	69
Groceries & frozen foods	6	3.14	2.92	107	27,400	2,546	9.51	12.38	77
Off licences & home brew	1	0.52	0.61	85	1,800	167	0.62	0.39	160
CTN & convenience	2	1.05	2.24	47	5,500	511	1.91	1.82	105
Comparison	**80**	**41.88**	**41.89**	**100**	**127,600**	**11,854**	**44.29**	**47.35**	**94**
Footwear & repairs	3	1.57	1.92	82	3,800	353	1.32	1.36	97
Mens, boys wear	0	0.00	1.02	0	0	0	0.00	0.88	0
Womens, girls & childrens clothing	10	5.24	4.82	109	9,600	892	3.33	4.17	80
Mixed & general clothing	5	2.62	3.50	75	12,000	1,115	4.17	6.13	68
Furniture, carpets, textiles	11	5.76	3.66	158	20,800	1,932	7.22	4.13	175
Books, arts/crafts, stationers/copy	8	4.19	4.07	103	13,700	1,273	4.76	3.14	152
Elec, home ent, 'phones & video	7	3.66	4.04	91	8,100	753	2.81	3.19	88
DIY, hardware & household goods	5	2.62	2.49	105	11,100	1,031	3.85	4.53	85
Gifts, china, glass & leather goods	1	0.52	1.62	32	600	56	0.21	0.88	24
Cars, motor cycles & accessories	2	1.05	1.29	81	7,500	697	2.60	1.99	131
Chemists, toiletries & opticians	9	4.71	3.91	121	19,900	1,849	6.91	3.95	175
Variety, department & catalogue	0	0.00	0.63	0	0	0	0.00	6.65	0
Florists & gardens	2	1.05	0.99	106	2,100	195	0.73	0.45	163
Sports, toys, cycles & hobbies	3	1.57	2.21	71	2,600	242	0.90	2.44	37
Jewellers, clocks & repairs	4	2.09	2.07	101	3,500	325	1.21	0.94	129
Charity, pets & other comparison	10	5.24	3.67	143	12,300	1,143	4.27	2.52	170
Service	**63**	**32.98**	**34.78**	**95**	**76,300**	**7,088**	**26.48**	**23.05**	**115**
Restaurants, cafes, fast food	26	13.61	15.70	87	32,900	3,057	11.42	10.79	106
Hairdressing, beauty & health	14	7.33	8.20	89	12,500	1,161	4.34	3.91	111
Launderettes & dry cleaners	2	1.05	0.98	107	2,100	195	0.73	0.46	158
Travel agents	3	1.57	1.29	122	3,700	344	1.28	0.77	167
Banks & financial services	8	4.19	4.19	100	16,500	1,533	5.73	4.51	127
Building societies	1	0.52	0.59	89	1,100	102	0.38	0.49	78
Estate agents & auctioneers	9	4.71	3.83	123	7,500	697	2.60	2.13	122
Miscellaneous	**31**	**16.23**	**14.10**	**115**	**36,200**	**3,363**	**12.57**	**12.25**	**103**
Employment, careers, POs & info	5	2.62	1.18	222	5,300	492	1.84	0.99	187
Vacant	26	13.61	12.92	105	30,900	2,871	10.73	11.26	95

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

Experian™ A world of insight

(C) Experian 2009 Navteq 2008

goad Centre Report

Winchcombe

Experian™ A world of insight

(C) Experian 2009 Navteq 2008

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

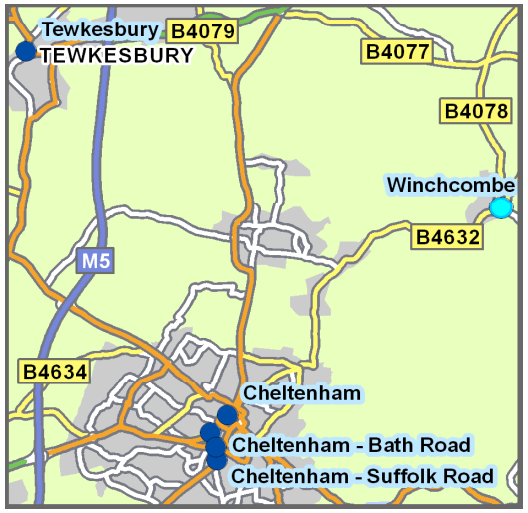
E-mail: goad.sales@uk.experian.com

Experian™
A world of insight

(C) Experian 2009 Navteq 2008

Winchcombe

goad Centre Report



Survey Date: 11-Mar-08

Closest Centres	Distance (km)
Cheltenham	9.6
Cheltenham - Montpellier Stree	10.3
Cheltenham - Suffolk Road	10.5
Cheltenham - Bath Road	10.7
Tewkesbury	13.9

Key Retail Indicators

Total Outlets	**61**
Total Floorspace (sq ft)	**56,600**

	Count	%	% UK	Index
Vacant Outlets	4	6.56	12.92	51
Vacant Floorspace (sq ft)	3,600	6.36	11.26	56
Multiple Outlets	8	13.11	30.49	43
Comparison Outlets	20	32.79	41.89	78

Major Retailers

Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	0	Phones 4 U	0
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	0	Superdrug	0
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	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	0
		Wilkinsons	0

Scope for individual categories

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	10	16.39	9.23	178	9,300	864	16.43	17.35	95
Comparison	20	32.79	41.89	78	19,000	1,765	33.57	47.35	71
Service	25	40.98	34.78	118	22,300	2,072	39.40	23.05	171
Vacant	4	6.56	12.92	51	3,600	334	6.36	11.26	56
Multiple Retailers by Trade Group									
Convenience	1	12.50	12.13	103	1,400	130	13.46	24.60	55
Comparison	2	25.00	53.69	47	2,200	204	21.15	56.04	38
Service	4	50.00	31.98	156	5,400	502	51.92	18.14	286
Miscellaneous	1	12.50	2.20	568	1,400	130	13.46	1.22	1102
Retail Category									
Convenience	**10**	**16.39**	**9.23**	**178**	**9,300**	**864**	**16.43**	**17.35**	**95**
Bakers	2	3.28	1.98	165	2,500	232	4.42	1.01	438
Butchers	2	3.28	0.82	402	2,200	204	3.89	0.44	881
Greengrocers & fishmongers	1	1.64	0.65	251	1,000	93	1.77	1.31	135
Groceries & frozen foods	3	4.92	2.92	168	2,200	204	3.89	12.38	31
Off licences & home brew	1	1.64	0.61	267	700	65	1.24	0.39	316
CTN & convenience	1	1.64	2.24	73	700	65	1.24	1.82	68
Comparison	**20**	**32.79**	**41.89**	**78**	**19,000**	**1,765**	**33.57**	**47.35**	**71**
Footwear & repairs	0	0.00	1.92	0	0	0	0.00	1.36	0
Mens, boys wear	0	0.00	1.02	0	0	0	0.00	0.88	0
Womens, girls & childrens clothing	3	4.92	4.82	102	2,300	214	4.06	4.17	97
Mixed & general clothing	1	1.64	3.50	47	900	84	1.59	6.13	26
Furniture, carpets, textiles	4	6.56	3.66	179	4,600	427	8.13	4.13	197
Books, arts/crafts, stationers/copy	2	3.28	4.07	81	2,000	186	3.53	3.14	113
Elec, home ent, 'phones & video	0	0.00	4.04	0	0	0	0.00	3.19	0
DIY, hardware & household goods	2	3.28	2.49	132	2,400	223	4.24	4.53	94
Gifts, china, glass & leather goods	1	1.64	1.62	101	1,200	111	2.12	0.88	241
Cars, motor cycles & accessories	0	0.00	1.29	0	0	0	0.00	1.99	0
Chemists, toiletries & opticians	3	4.92	3.91	126	3,200	297	5.65	3.95	143
Variety, department & catalogue	0	0.00	0.63	0	0	0	0.00	6.65	0
Florists & gardens	1	1.64	0.99	166	800	74	1.41	0.45	316
Sports, toys, cycles & hobbies	1	1.64	2.21	74	400	37	0.71	2.44	29
Jewellers, clocks & repairs	0	0.00	2.07	0	0	0	0.00	0.94	0
Charity, pets & other comparison	2	3.28	3.67	89	1,200	111	2.12	2.52	84
Service	**25**	**40.98**	**34.78**	**118**	**22,300**	**2,072**	**39.40**	**23.05**	**171**
Restaurants, cafes, fast food	8	13.11	15.70	84	8,400	780	14.84	10.79	138
Hairdressing, beauty & health	9	14.75	8.20	180	5,600	520	9.89	3.91	253
Launderettes & dry cleaners	1	1.64	0.98	167	500	46	0.88	0.46	191
Travel agents	0	0.00	1.29	0	0	0	0.00	0.77	0
Banks & financial services	2	3.28	4.19	78	3,000	279	5.30	4.51	118
Building societies	1	1.64	0.59	278	900	84	1.59	0.49	326
Estate agents & auctioneers	4	6.56	3.83	171	3,900	362	6.89	2.13	324
Miscellaneous	**6**	**9.84**	**14.10**	**70**	**6,000**	**557**	**10.60**	**12.25**	**87**
Employment, careers, POs & info	2	3.28	1.18	278	2,400	223	4.24	0.99	430
Vacant	4	6.56	12.92	51	3,600	334	6.36	11.26	56

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

Experian™ A world of insight

(C) Experian 2009 Navteq 2008