

BRIDGEND TOWN CENTRE HEALTH CHECK ASSESSMENT

2001

1. INTRODUCTION

- 1.1 The purpose of this health check is to assess the performance of the Bridgend Town Centre in 2001 to see what changes have occurred since 2000. As with previous Town Centre Health Checks the assessment is based upon analysing the most up to date available data on indicators of town centre vitality and viability drawn up in the tables 1-10 which appear in appendix A attached.
- 1.2 The conclusion of the 2000 Health Check assessment was that the levels of viability and vitality in the town centre remained good although the overall performance has not been as good as that experienced in 1999. This, however, was similar to the performance of other centres of similar size and catchment. This was explained by the poor performance of many high street retailers and to changes in the character of consumer behaviour.

2. RETAIL FLOORSPACE RENTS

- 2.1 At a national level 2001 saw uncertainty amongst occupiers of retail floorspace which saw prime rental growth fall to its lowest since that achieved between 1993 and 1994. Average prime rents in the U.K. have fallen from £99 per sq. ft to £98 per sq. ft. This followed a period of poor performance by retail centres in 2000.
- 2.2 In Bridgend prime retail rental values between 2000 and 2001 have remained static at £60 per sq. ft whereas in the other centres including Cardiff, Swansea and Newport (in table 1) values have fallen. In Cardiff average rental values have fallen from £245 per sq. ft in mid 2000 to £220 per sq. ft in 2001. This would indicate that Bridgend as a town has fared well when compared to other centres. The source of rental growth in 2001 was not dominated as is normally the case by large regional centres but rather by the small centres. Most centres of similar size to Bridgend in the retail hierarchy such as Pontypridd (£50 per sq. ft), Merthyr Tydfil (£60 per sq. ft), Neath (£70 per sq. ft) and Llanelli (£50 per sq. ft) have seen their rentals remain static. Secondary frontage retail rents have also remained static and this was the case with other centres of comparison. However Bridgend has experienced real rental growth in rents for commercial office floorspace.

3. COMMERCIAL YIELD

- 3.1 The point to be noted with commercial yield is that the lower the yield the higher the value of expected future rental for a property. Generally,

lower yields reflect competition by investors to secure income returns in a town.

- 3.2 It can be seen from table 3 that generally there has been small rises in yields in the main centres which implies reduced investor confidence in retail floorspace in 2001 and this corresponds with the simultaneous decline in prime retail rents. In Bridgend, however, the percentage yield in 2001 is estimated at 7.5% which is the same as that in 2000 and indicates continuing but static investor confidence in the Centre.

4. RETAIL PROVISION AND THE DIVERSITY OF USES

- 4.1 2001 saw an increase in the number of multiple retailers in the town centre from 107 in 2000 to 113 in 2001. A multiple retailer is defined as being part of a network of nine or more outlets. In mid 2001 multiple outlets accounted for 37.54% of all outlets in the town centre (table 9) which is higher than the GB average of 34.39% in other centres.

- 4.2 The total number of retail outlets in the town centre was 261, in 2000 it was 260. There has been little change in the division between the different sectors of floorspace occupied. Of the 261 outlets 15 provide convenience goods, 147 comparison goods and 99 are service providers. In terms of floorspace occupied the total retail floorspace has increased from 613,000 sq. ft in August 2000 to 620,1000 sq. ft in August 2001. There has been a small decrease in convenience goods floorspace and a slightly larger increase in the comparison goods floorspace occupied 50.7% in 2000 to 54.12% in 2001.

4.3 Retail Centre Ranking 2001

Recently Goad have started to produce a national retail centre ranking. This assesses the vitality of a centre in a regional and national context by combining factors taken from Goad Centre Reports. These factors are combined to generate a vitality and viability score for each centre, which is then ranked.

- 4.4 The ranking of each centre is a relative measure and is a function of its own and other centres vitality scores.

- 4.5 The factors used to create a vitality score together with their appropriate weighting are as follows: -

- (a) Number of multiple retailer outlets (40%)
- (b) Number of service and miscellaneous outlets (10%)
- (c) Number of comparisons retailer outlets (10%)
- (d) Floorspace of multiple retailers outlets (10%)
- (e) Floorspace of retail outlets (10%)
- (f) Floorspace of vacant outlets (10%)
- (g) Number of key retail attractors (10%)

- 4.6 Appendix B shows the retail centre ranking 2001. Bridgend is ranked 266 with a vitality score of 104 and therefore falls in the middle of the ranking league of 517 outlets listed. It is therefore a centre of average vitality, Cardiff is ranked 8th, Pontypridd 259th, Neath 277th, Merthyr Tydfil 300th, Swansea 57th, Newport 88th and Llanelli 283rd.

5. PEDESTRIAN FLOW

- 5.1 Pedestrian flow or footfall provides the most basic measure of usage, counting the number of people passing a particular point at a particular time.
- 5.2 Pedestrian flow count data for shoppers using the Rhiw Centre have recently become available. The Rhiw Centre is an important part of the Bridgend Primary frontages and footfall here provides a good indication of vitality within the town centre as a whole.
- 5.3 Appendix C shows data on pedestrian flow for the Rhiw centre. The pedestrian counts are taken during sample surveys and do not represent the total number of pedestrians using the centre. They are, however, sample flows taken at different times of the day during busy, medium and low flow periods. The count is for the number of people passing a particular point at a particular time. The total flow counts are therefore directly comparable for each week, and with previous years.
- 5.4 From a comparison of weekly flows over the same periods for 2000 and 2001 it can be seen that there generally has been an increase in the total weekly flows. The figures do not show any significant decrease in pedestrian flows to indicate a decline in vitality. On the contrary the trends show that between 2000 and 2001 there has been a 7% increase in the flow of pedestrians which indicates encouraging levels of vitality and attractiveness.

6. VACANT STREET LEVEL PROPERTY

- 6.1 Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre.
- 6.2 In 2001 the average unit vacancy rate for town centres in GB was 10.89%. In Bridgend the number of vacant units in August 2001 was 35, representing 11.63% of all units which is only slightly above the GB average. This represents 10.63% of the total available retail floorspace in Bridgend town centre and is a significant decrease from the 14.81% recorded by Goad surveys in August 2000.

7. SAFETY ACCESSIBILITY AND ENVIRONMENTAL QUALITY

- 7.1 The regeneration of the town centre continued in 2001 with the implementation of a permanent and comprehensive pedestrianisation scheme, traffic circulation route and traffic management measures. The experimental traffic orders and scheme which had been in operation for an 18 month period expired in September 2001. The traffic orders were however, confirmed by an Independent Inspector following the convening of a Public Inquiry in June 2001 at which objections to the scheme were heard. The effect of the confirmation of the order was to exclude all vehicular traffic and cyclists from the main town centre streets, Adare Street, Wyndham Street, Caroline Street, parts of Elder Street and Elder Lane, Dunraven Place and park Street between 10:00 and 18:00 hours and to allow access only for loading and unloading at other times. Generally traffic has been allowed to use the distributor loop formed by Derwen Road, Nolton Street (north), the Rhiw, Water Street (east), Queen Street, Dunraven Place (south) and Market Street circulating around this box in a one-way system, clockwise.
- 7.2 The effects of the implementation of the pedestrian scheme and traffic circulation system has improved safety on the town centre roads by removing pedestrian/vehicular conflict. It has facilitated pedestrian and public transport access and reduced congestion by removing or reducing the number of vehicles on the town centre roads. The scheme has also produced a high quality pleasant and clean physical environment with substantially improved amenities. The removal of traffic has also reduced noise and air pollution and has created economic and cultural activity within the streets. This had made it a more attractive centre not only for visitors but also for developers and investors to locate high quality uses. There has already been a great deal of interest and enquiries, and planning applications to locate high quality businesses such as restaurants, coffee shop and offices within the pedestranised zone.

8. CONCLUSION

- 8.1 Prime rental levels continue to be £60 per sq. ft the same as that in 2001 and is a good performance when compared to declining values experienced in other large centres such as Cardiff, Swansea and Newport where rents have actually fallen. In Cardiff retail rents have fallen from £245 per sq. ft to £220 per sq. ft. Rents for prime office space are estimated to have increased and indicates increasing interest in Bridgend as a location for office businesses.
- 8.2 There has been a significant increase in the number of multiple retailers. Although the total number of outlets has not changed significantly, 261 in 2001 compared to 260 in 2000, the number of multiple retailers has however increased from 107 in 2000 to 113 in 2001 which is 37.5% of all outlets and is higher than the GB average of

34.4%. More importantly is that all of the key attractors including Adams, Burton, Clarks, Clintons, Dixons, Dorothy Perkins, Evans, McDonalds, Mothercare, New Look, Top Man, Boots, WH Smith and Woolworths have maintained their outlets which indicates continuing economic confidence in the retail area.

- 8.3 Although there has been a slight increase in the vacancy rate from 11.07% in 2000 to 11.63% in 2001, this however should be viewed in the light of a substantial increase in the total floorspace occupied from 613,000 sq. ft in 2000 to 620,000 sq. ft in 2001.
- 8.4 Sample surveys indicate that in 2001 there was a 7% increase in the pedestrian flow rate in the Rhiw shopping centre when compared to 2000. This is a key indicator of increasing vitality.
- 8.5 Overall it can be concluded that in 2001 Bridgend continues to be an attractive centre for shoppers. Its physical environment, public realm and safety has been highly enhanced by the establishment of a permanently pedestranised zone within the town. From the indicators assessed the facts do not show decline in Bridgend town but levels of vitality that are very good for a town centre of its size and catchment. This is confirmed by Goad which ranks Bridgend town centre at 266th place in terms of health and vitality out of 517 centres evaluated.

Table 1 : Prime Zone A retail rental values (£/sq ft)

| | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 2000 | 2001 |
|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|
| Bridgend | 55 | 55 | 55 | 55 | 55 | 55 | 58 | 58 | 58 | 60 | 60 | 60 |
| Cardiff | 165 | 160 | 155 | 145 | 140 | 140 | 150 | 160 | 200 | 225 | 245 | 220 |
| Swansea | 120 | 120 | 105 | 100 | 100 | 100 | 100 | 125 | 130 | 140 | 160 | 150 |
| Newport | 100 | 100 | 110 | 80 | 100 | 110 | 110 | 115 | 120 | 125 | 135 | 120 |
| UK | 79 | 76 | 72 | 70 | 70 | 70 | 75 | 81 | 87 | 93 | 99 | 98 |

Source: Cooke & Arkwright Welsh Property Review, 2001
Conrad Ritblat Erdman in Town Retail Rents, 2001

Table 2 : Secondary Shop Rents (£/sq ft)

| | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 2000 | 2001 |
|----------|----|----|----|----|----|----|----|----|----|----|------|------|
| Bridgend | 35 | 35 | 35 | 35 | 35 | 35 | 25 | 25 | 25 | 25 | 25 | 25 |
| Cardiff | 65 | 65 | 60 | 60 | 65 | 65 | 65 | 70 | 85 | 95 | 100 | 100 |
| Swansea | 40 | 40 | 35 | 35 | 35 | 35 | 35 | 40 | 50 | 70 | 70 | 70 |
| Newport | 50 | 45 | 35 | 35 | 40 | 40 | 40 | 40 | 40 | 40 | 45 | 45 |

Source: Cooke & Arkwright Welsh Property Review, 2001

Table 3 : Prime Retail Floorspace Yields (%)

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 |
|----------|------|------|------|------|------|------|------|
| Bridgend | 7.00 | 7.25 | 7.25 | 7.25 | 7.50 | 7.50 | 7.75 |
| Cardiff | 4.25 | 4.25 | 5.00 | 4.50 | 5.50 | 5.50 | 5.75 |
| Swansea | 5.50 | 5.25 | 5.50 | 5.50 | 5.75 | 6.00 | 6.5 |
| Newport | 5.50 | 5.25 | 6.00 | 6.00 | 6.00 | 7.00 | 7.25 |

Source: Cooke & Arkwright Welsh Property Review, 2001

Table 4 : Prime Commercial Office Rents

| | 96 | 97 | 98 | 99 | 2000 | 2001 |
|----------|------|------|------|------|------|------|
| Bridgend | 6.0 | 6.0 | 6.5 | 8.0 | 9.0 | 10.0 |
| Cardiff | 16.5 | 16.5 | 16.5 | 16.5 | 17.0 | 18.5 |
| Swansea | 8.5 | 8.0 | 8.0 | 8.0 | 8.5 | 10.0 |
| Newport | 8.0 | 10.5 | 10.5 | 10.5 | 10.5 | 10.5 |

Source: Cooke & Arkwright Welsh Property Review, 2001

Table 5 : Prime Office Commercial Yields (%)

| | 97 | 98 | 99 | 2000 | 2001 |
|----------|------------|-----------|-----------|-----------|------------|
| Bridgend | 12.0-14.0 | 12.0-14.0 | 12.0-14.0 | 9.0-14.0 | 9.0-14.0 |
| Cardiff | 7.00-8.00 | 7.00-8.00 | 7.00-8.00 | 7.00-9.00 | 7.00-9.00 |
| Swansea | 10.0-11.0 | 10.0-11.0 | 10.0-11.0 | 9.00-11.0 | 9.00-11.00 |
| Newport | 9.00-11.00 | 9.00-11.0 | 9.00-11.0 | 9.00-11.0 | 9.00-11.00 |

Source: Cooke & Arkwright Welsh Property Review, 2001

Table 6 : Change in the Number of Retail Outlets

| | 1986 | 1989 | 1994 | 1997 | 1998 | 1999 | 2000 | 2001 |
|-------------|-------------|-------------|-------------|-------------|--------------|--------------|--------------|--------------|
| Convenience | 32 (10.5%) | 28 (9.0%) | 22 (7.2%) | 18 (5.9%) | 15 (4.97%) | 16 (5.39%) | 16 (5.37%) | 15 (4.98%) |
| Comparison | 157 (51.5%) | 160 (52.5%) | 160 (52.1%) | 153 (50.8%) | 147 (48.68%) | 149 (50.17%) | 144 (48.32%) | 147 (48.84%) |
| Services | 67 (22%) | 73 (24%) | 86 (28.0%) | 95 (31.5%) | 99 (32.78%) | 102 (34.34%) | 100 (33.56) | 99 (32.89%) |
| Total | 256 | 261 | 268 | 266 | 261 | 267 | 260 | 261 |

Source : Goad

Table 7 : Change in Retail Floorspace 000's sq ft (Ground floor footprint floorspace)

| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 |
|---------------|---------------|---------------|---------------|---------------|----------------|----------------|----------------|----------------|
| Convenience | 74.7 (12.6%) | 68.2 (11.5%) | 118.6 (17.9%) | 117.9 (17.9) | 114.7 (17.98%) | 105.3 (16.48%) | 79.9 (13.03%) | 78.3 (12.61%) |
| Comparison | 322.6 (54.4%) | 343.8 (57.9%) | 333.4 (50%) | 326.3 (49.7%) | 319 (50.0%) | 320.4 (50.16%) | 306.9 (50.07%) | 33.6 (54.12%) |
| Services | 129.1 (12.7%) | 126.8 (21.3%) | 128.0 (19.3%) | 132.3 (20.1%) | 132 (20.69%) | 143.9 (22.53%) | 131.5 (21.45%) | 136.2 (21.94%) |
| Miscellaneous | 66.4 (11.2%) | 54.2 (9.1%) | 80.5 (12.1%) | 78.9 (12.0%) | 72.4 (11.35%) | 69.2 (10.83 %) | 94.7 (15.45%) | 70.3 (11.3%) |
| Total | 592.8 (100%) | 593.0 (100%) | 660.5 (100%) | 655.4 (100%) | 638.1 (100 %) | 638.8 (100%) | 613 (100%) | 620.1 (100%) |

Source : Goad

Table 8: Vacant Street Level Property

| | 1986 | 1989 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 |
|----------------------|------|------|------|------|------|------|-------|------|-------|-------|
| No of vacant units | 29 | 24 | 35 | 34 | 39 | 30 | 37 | 26 | 33 | 35 |
| Percent of all units | 10.1 | 8.4 | 11.5 | 11.2 | 12.7 | 9.9 | 12.25 | 8.75 | 11.07 | 11.63 |

Source: Goad

Table 9: Key Retail Indicators

| | Count | % | GB % |
|----------------------------------|-------|-------|-------|
| Vacant Outlets | 35 | 11.63 | 10.89 |
| Vacant Floorspace (000 sq ft) | 66 | 10.63 | 8.44 |
| Multiple Outlets | 113 | 37.54 | 34.39 |
| Comparison Outlets | 147 | 48.84 | 49.09 |

Source: Goad 2001

APPENDIX B

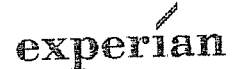
Retail Centre Ranking 2001



Retail Centre Ranking 2001

| Rank | Centre Name | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|----------------------|------------------------|----------|---------------|---------------|---------------|
| 1 | West End | Greater London | 470 | 8% | 0% | 1% |
| 2 | Glasgow | Scotland | 362 | -1% | 11% | 1% |
| 3 | Nottingham | East Midlands | 340 | 7% | 1% | 10% |
| 4 | Leeds | Yorkshire & Humberside | 319 | 8% | -2% | -3% |
| 5 | Birmingham | West Midlands | 306 | 5% | -3% | -1% |
| 6 | Manchester | North West | 282 | 2% | -9% | 2% |
| 7 | Liverpool | North West | 277 | 6% | 1% | 0% |
| 8 | Gardiff | Wales | 276 | 2% | -6% | 3% |
| 9 | Norwich | East Anglia | 271 | 14% | -7% | 5% |
| 10 | Leicester | East Midlands | 271 | 0% | 8% | 0% |
| 11 | Chester | North West | 271 | -1% | 2% | 0% |
| 12 | Edinburgh | Scotland | 268 | 3% | -3% | -1% |
| 13 | Southampton | South East - South | 260 | 21% | 1% | -1% |
| 14 | Bristol | South West | 258 | 2% | -1% | 1% |
| 15 | Kingston-Upon-Thames | Greater London | 254 | -4% | 6% | 1% |
| 16 | York | Yorkshire & Humberside | 252 | 6% | -6% | 1% |
| 17 | Bromley | Greater London | 251 | -6% | 4% | 3% |
| 18 | Bluewater | South East - South | 251 | 2% | - | - |
| 19 | Newcastle-upon-Tyne | North | 250 | 5% | -9% | -1% |
| 20 | Guildford | South East - South | 250 | 2% | 3% | 0% |
| 21 | Reading | South East - North | 247 | -4% | 10% | 0% |
| 22 | Croydon | Greater London | 244 | 11% | -5% | 0% |
| 23 | Lakeside | South East - North | 243 | -1% | 8% | 1% |
| 24 | Merry Hill Centre | West Midlands | 239 | 0% | 1% | 1% |
| 25 | Brighton | South East - South | 239 | 4% | 0% | 12% |
| 26 | Hull | Yorkshire & Humberside | 239 | 2% | -1% | 3% |
| 27 | Aberdeen | Scotland | 238 | 2% | 2% | 0% |
| 28 | Plymouth | South West | 237 | -1% | 2% | 2% |
| 29 | Watford | South East - North | 233 | -2% | 8% | 0% |
| 30 | Sheffield | Yorkshire & Humberside | 230 | -5% | -1% | 3% |
| 31 | Meadowhall Centre | Yorkshire & Humberside | 228 | -2% | 3% | 1% |
| 32 | Cheltenham | South West | 228 | 3% | 6% | 2% |
| 33 | Peterborough | East Anglia | 225 | -1% | 2% | -2% |
| 34 | Bradford | Yorkshire & Humberside | 225 | 6% | 8% | -1% |
| 35 | Stockport | North West | 225 | -1% | 7% | 1% |
| 36 | Middlesbrough | North | 222 | 7% | 0% | -1% |
| 37 | Bath | South West | 221 | -1% | -8% | -1% |
| 38 | Crawley | South East - South | 219 | 5% | 4% | -3% |
| 39 | Ipswich | East Anglia | 219 | 4% | 5% | -1% |
| 40 | Trafford Centre | North West | 217 | 1% | - | - |
| 41 | Cribbs Causeway | South West | 214 | 5% | 15% | - |
| 42 | Milton Keynes | South East - North | 212 | 10% | -2% | 0% |
| 43 | Chelmsford | South East - North | 211 | 1% | 0% | 3% |
| 44 | Cambridge | East Anglia | 211 | 1% | -8% | -5% |
| 45 | Bolton | North West | 210 | 2% | -5% | -5% |
| 46 | Sunderland | North | 209 | 8% | 0% | -2% |
| 47 | Sutton | Greater London | 209 | 5% | 6% | 5% |
| 48 | Wolverhampton | West Midlands | 205 | 12% | -3% | -6% |
| 49 | Exeter | South West | 205 | -3% | -1% | -9% |
| 50 | Belfast | Northern Ireland | 204 | -2% | 3% | - |

100% will be shared with the retailer. The retailer will be responsible for the costs of the centre.



Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|-------------------|------------------------|----------|---------------|---------------|---------------|
| 51 | Doncaster | Yorkshire & Humberside | 203 | 8% | -8% | -1% |
| 52 | Metro Centre | North | 203 | 2% | -16% | 3% |
| 53 | Maidstone | South East - South | 203 | -1% | 8% | 1% |
| 54 | Romford | Greater London | 202 | 19% | -16% | 5% |
| 55 | Oxford | South East - North | 202 | -2% | -2% | -5% |
| 56 | Coventry | West Midlands | 201 | -2% | -2% | 0% |
| 57 | Swansea | Wales | 201 | 1% | -1% | -2% |
| 58 | Tunbridge Wells | South East - South | 201 | -4% | 4% | -1% |
| 59 | Northampton | East Midlands | 201 | 4% | 0% | 1% |
| 60 | Worcester | West Midlands | 199 | 7% | -7% | 4% |
| 61 | Dundee | Scotland | 198 | 13% | 4% | 0% |
| 62 | Hanley | West Midlands | 196 | 1% | -6% | 0% |
| 63 | Warrington | North West | 191 | -2% | 0% | 8% |
| 64 | Colchester | South East - North | 190 | 1% | 1% | -3% |
| 65 | Lincoln | East Midlands | 189 | -3% | -1% | -6% |
| 66 | Basildon | South East - North | 188 | 2% | 1% | 1% |
| 67 | Gloucester | South West | 188 | 5% | 0% | -1% |
| 68 | Darlington | North | 187 | 3% | 0% | -2% |
| 69 | Harrow | Greater London | 186 | 9% | -7% | -2% |
| 70 | Derby | East Midlands | 186 | -3% | -13% | 0% |
| 71 | Canterbury | South East - South | 185 | -5% | -1% | -2% |
| 72 | Preston | North West | 184 | -4% | 5% | -4% |
| 73 | Shrewsbury | West Midlands | 182 | 2% | 3% | -3% |
| 74 | Bury | North West | 180 | 3% | -1% | 5% |
| 75 | Stirling | Scotland | 179 | -3% | 1% | 4% |
| 76 | Wakefield | Yorkshire & Humberside | 177 | 4% | -4% | -6% |
| 77 | Carlisle | North | 177 | 7% | 10% | -1% |
| 78 | Ealing Broadway | Greater London | 177 | 6% | -4% | 2% |
| 79 | Slough | South East - North | 177 | -1% | -5% | 1% |
| 80 | Swindon | South West | 177 | -3% | 0% | -5% |
| 81 | Harrogate | Yorkshire & Humberside | 175 | 2% | 2% | -1% |
| 82 | Leamington Spa | West Midlands | 175 | 4% | -8% | -1% |
| 83 | Braehead | Scotland | 175 | - | - | - |
| 84 | Hereford | West Midlands | 174 | 7% | 0% | 2% |
| 85 | Walsall | West Midlands | 174 | -1% | 9% | -7% |
| 86 | Birkenhead | North West | 173 | -5% | -2% | 0% |
| 87 | Hounslow | Greater London | 173 | 0% | 5% | -1% |
| 88 | Newport | Wales | 172 | 4% | 7% | -1% |
| 89 | Southend-on-Sea | South East - North | 172 | -1% | -1% | -1% |
| 90 | Salisbury | South West | 171 | -4% | 6% | -7% |
| 91 | Portsmouth | South East - South | 170 | 0% | -1% | -5% |
| 92 | Burton-Upon-Trent | West Midlands | 169 | 2% | 4% | -4% |
| 93 | East Kilbride | Scotland | 169 | -1% | -1% | 6% |
| 94 | Ilford | Greater London | 169 | 4% | 14% | -6% |
| 95 | Huddersfield | Yorkshire & Humberside | 168 | -9% | -1% | -3% |
| 96 | Solihull | West Midlands | 168 | 3% | -3% | 0% |
| 97 | Wrexham | Wales | 167 | 15% | -9% | -3% |
| 98 | Bedford | South East - North | 167 | -2% | 4% | -6% |
| 99 | Blackpool | North West | 166 | -1% | -7% | 4% |
| 100 | Telford | West Midlands | 166 | 4% | -1% | -5% |

How many more retail centres than any other retailer in the UK
 & a further 400 following a programme of new retail centres and
 developments in the UK and overseas.



Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|---------------------|------------------------|----------|------------------|------------------|------------------|
| 101 | Taunton | South West | 165 | 3% | -8% | 7% |
| 102 | Barnsley | Yorkshire & Humberside | 165 | 13% | 0% | 1% |
| 103 | High Wycombe | South East - North | 163 | -1% | -2% | 1% |
| 104 | Durham | North | 163 | 4% | 10% | -3% |
| 105 | Stevenage | South East - North | 163 | 11% | -2% | -2% |
| 106 | Inverness | Scotland | 162 | 5% | -3% | 1% |
| 107 | Horsham | South East - South | 162 | 7% | -4% | 5% |
| 108 | Brent Cross | Greater London | 161 | 0% | 8% | 0% |
| 109 | Crewe | North West | 161 | 3% | 16% | -10% |
| 110 | Wood Green | Greater London | 161 | 9% | -8% | 7% |
| 111 | Grimsby | Yorkshire & Humberside | 161 | 1% | 0% | 0% |
| 112 | Falkirk | Scotland | 160 | -4% | 0% | -2% |
| 113 | Eastbourne | South East - South | 159 | 11% | -7% | -5% |
| 114 | Lancaster | North West | 159 | 5% | 7% | -4% |
| 115 | Stafford | West Midlands | 158 | 1% | 1% | 0% |
| 116 | Ayr | Scotland | 158 | 3% | 1% | -6% |
| 117 | Woking | South East - South | 158 | 1% | 3% | -3% |
| 118 | Hemel Hempstead | South East - North | 158 | 1% | 2% | 5% |
| 119 | Luton | South East - North | 158 | 6% | -4% | -6% |
| 120 | White Rose | Yorkshire & Humberside | 157 | 1% | 5% | - |
| 121 | Worthing | South East - South | 156 | 1% | 0% | -6% |
| 122 | Nuneaton | West Midlands | 156 | 6% | -3% | 0% |
| 123 | Sutton Coldfield | West Midlands | 156 | 0% | 2% | -4% |
| 124 | St Helens | North West | 154 | -7% | -2% | 0% |
| 125 | Stratford-upon-Avon | West Midlands | 153 | -6% | -3% | -1% |
| 126 | Wigan | North West | 153 | -2% | 2% | 0% |
| 127 | Mansfield | East Midlands | 153 | -2% | -5% | 0% |
| 128 | Camberley | South East - South | 152 | 3% | -3% | 0% |
| 129 | Harlow | South East - North | 152 | 3% | 2% | 0% |
| 130 | Chichester | South East - South | 152 | -2% | 5% | -2% |
| 131 | Poole | South West | 152 | 8% | -4% | -5% |
| 132 | King's Lynn | East Anglia | 152 | 8% | -7% | -4% |
| 133 | Bracknell | South East - North | 152 | 2% | 10% | -2% |
| 134 | Southport | North West | 151 | -7% | -2% | -4% |
| 135 | Chatham | South East - South | 151 | 2% | -2% | 7% |
| 136 | Yeovil | South West | 151 | 1% | 2% | -2% |
| 137 | Kidderminster | West Midlands | 150 | 0% | 2% | -2% |
| 138 | Chesterfield | East Midlands | 149 | 16% | 1% | -1% |
| 139 | Wimbledon | Greater London | 149 | 1% | 5% | -4% |
| 140 | Basingstoke | South East - South | 149 | 10% | -13% | 0% |
| 141 | Staines | South East - South | 149 | 18% | -10% | -1% |
| 142 | Welwyn Garden City | South East - North | 149 | 9% | -2% | 1% |
| 143 | Torquay | South West | 148 | 0% | 0% | 1% |
| 144 | Epsom | South East - South | 147 | 2% | 1% | -6% |
| 145 | Winchester | South East - South | 146 | 0% | 3% | 0% |
| 146 | Truro | South West | 146 | -1% | 2% | -5% |
| 147 | Aylesbury | South East - North | 146 | 4% | 11% | -8% |
| 148 | Ashford | South East - South | 145 | 1% | -2% | 3% |
| 149 | Burnley | North West | 145 | 18% | -15% | 0% |
| 150 | Rochdale | North West | 144 | -3% | 6% | -1% |

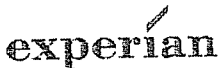
Where population of catchments is not available, the vitality score is based on the number of shops in the centre and the number of shops in the surrounding area.



Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|--------------------------------|------------------------|----------|------------------|------------------|------------------|
| 151 | Blackburn | North West | 144 | -5% | -2% | -1% |
| 152 | Perth | Scotland | 142 | 8% | -6% | 2% |
| 153 | Kensington | Greater London | 142 | -9% | -2% | 0% |
| 154 | Enfield | Greater London | 141 | 1% | -3% | -6% |
| 155 | Bournemouth | South West | 140 | -7% | -4% | -1% |
| 156 | Bexleyheath | Greater London | 140 | -5% | -3% | 0% |
| 157 | Greenock | Scotland | 140 | -1% | -2% | 3% |
| 158 | Barrow-in-Furness | North | 138 | 7% | 6% | -2% |
| 159 | Bury St Edmunds | East Anglia | 138 | 1% | 1% | -3% |
| 160 | Kilmarnock | Scotland | 138 | 16% | -4% | -9% |
| 161 | Richmond | Greater London | 138 | -2% | -2% | -5% |
| 162 | Windsor | South East - North | 138 | -1% | -1% | 1% |
| 163 | Loughborough | East Midlands | 136 | 13% | -3% | 1% |
| 164 | St Albans | South East - North | 136 | -1% | -6% | 0% |
| 165 | Kirkcaldy | Scotland | 136 | 10% | -6% | -4% |
| 166 | Barnstaple | South West | 136 | 6% | 5% | -6% |
| 167 | Fareham | South East - South | 135 | 2% | 2% | 0% |
| 168 | West Bromwich | West Midlands | 134 | 7% | -1% | 2% |
| 169 | Tamworth | West Midlands | 134 | -1% | 0% | 0% |
| 170 | Banbury | South East - North | 134 | 5% | 1% | -3% |
| 171 | Hammersmith | Greater London | 134 | 6% | -4% | 0% |
| 172 | Oldham | North West | 133 | 3% | 3% | -4% |
| 173 | Grafton Centre | North West | 133 | -1% | -1% | 3% |
| 174 | Paisley | East Anglia | 133 | 4% | -1% | -7% |
| 175 | Rugby | Scotland | 132 | -6% | 7% | 3% |
| 176 | South Shields | West Midlands | 132 | -6% | 7% | 3% |
| 177 | Macclesfield | North | 132 | 9% | -2% | -2% |
| 178 | Newbury | North West | 132 | 5% | 5% | -7% |
| 179 | Altrincham | South East - North | 131 | 5% | -7% | -1% |
| 180 | Kettering | North West | 131 | -2% | -5% | -3% |
| 181 | Uxbridge | East Midlands | 131 | 8% | -10% | 5% |
| 182 | Putney | East Midlands | 131 | -4% | 4% | -4% |
| 183 | Redhill | Greater London | 130 | 5% | 6% | 1% |
| 184 | Livingston | Greater London | 130 | 0% | 4% | -1% |
| 185 | Halifax | South East - South | 127 | 0% | 7% | 8% |
| 186 | Clydebank | Scotland | 127 | 0% | 7% | 8% |
| 187 | Eastleigh | Yorkshire & Humberside | 127 | -1% | 12% | -14% |
| 188 | Liverpool Street & Bishopsgate | Scotland | 126 | 3% | 5% | -3% |
| 189 | Cwmbran | South East - South | 126 | -1% | 7% | -1% |
| 190 | Weston-super-Mare | Greater London | 126 | 2% | 1% | 9% |
| 191 | Lewisham | Greater London | 126 | 2% | 1% | 9% |
| 192 | Irvine | Wales | 125 | -1% | 5% | -2% |
| 193 | Dartford | South West | 124 | 6% | -7% | -2% |
| 194 | Scarborough | Greater London | 124 | -8% | -2% | -1% |
| 195 | Hastings | Greater London | 124 | -1% | 7% | 0% |
| 196 | Grantham | Scotland | 124 | -1% | 7% | 0% |
| 197 | Keighley | South East - South | 124 | 13% | -16% | 2% |
| 198 | Redditch | Yorkshire & Humberside | 123 | -10% | -1% | 6% |
| 199 | Llandudno | South East - South | 123 | 8% | 6% | -1% |
| 200 | Northwich | East Midlands | 122 | 19% | 4% | 4% |
| | | West Midlands | 122 | 3% | -6% | 0% |
| | | Yorkshire & Humberside | 122 | 3% | -2% | -1% |
| | | West Midlands | 122 | 3% | -2% | -1% |
| | | Wales | 121 | 4% | 11% | -6% |
| | | North West | 121 | 9% | 1% | 0% |

For full details of each centre please visit our website at www.experian.co.uk



Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|-----------------------------|------------------------|----------|------------------|------------------|------------------|
| 201 | Maidenhead | South East - North | 120 | -7% | -3% | -1% |
| 202 | Andover | South East - South | 120 | -6% | 7% | -1% |
| 203 | Newry | Northern Ireland | 120 | 14% | 2% | - |
| 204 | Carmarthen | Wales | 119 | 6% | 12% | -1% |
| 205 | Hamilton | Scotland | 119 | -5% | 1% | -4% |
| 206 | Orpington | Greater London | 118 | 4% | -4% | 4% |
| 207 | Parkhead | Scotland | 118 | -2% | 2% | -3% |
| 208 | Rhyl | Wales | 118 | 0% | -4% | -2% |
| 209 | Dumfries | Scotland | 118 | -4% | 4% | 2% |
| 210 | Chelsea | Greater London | 117 | -2% | -11% | -3% |
| 211 | Eltham | Greater London | 117 | 2% | -4% | -5% |
| 212 | Kendal | North | 117 | -2% | 1% | -9% |
| 213 | Chorley | North West | 116 | 7% | -4% | 0% |
| 214 | Dunfermline | Scotland | 116 | 4% | -1% | -5% |
| 215 | Ashton-under-Lyne | North West | 116 | 3% | 5% | 1% |
| 216 | Hartlepool | North | 116 | 4% | -3% | 2% |
| 217 | Glenrothes | Scotland | 116 | 13% | 4% | -2% |
| 218 | Lisburn | Northern Ireland | 115 | 3% | 2% | - |
| 219 | Bangor | Wales | 115 | -6% | 2% | -3% |
| 220 | Chippenham | South West | 115 | 3% | 3% | 0% |
| 221 | Scunthorpe | Yorkshire & Humberside | 115 | -3% | 9% | -15% |
| 222 | Kings Heath | West Midlands | 115 | 3% | 1% | -6% |
| 223 | Bootle | North West | 114 | 18% | -3% | -9% |
| 224 | Rotherham | Yorkshire & Humberside | 114 | 4% | -2% | -1% |
| 225 | Lowestoft | East Anglia | 114 | 1% | -1% | -4% |
| 226 | Newtownabbey - Abbey Centre | Northern Ireland | 113 | 2% | 5% | - |
| 227 | Bishop Auckland | North | 113 | -3% | -4% | 0% |
| 228 | Londonderry | Northern Ireland | 113 | 5% | -11% | - |
| 229 | Covent Garden | Greater London | 112 | -3% | 3% | -6% |
| 230 | Brentwood | South East - North | 111 | -1% | -2% | -2% |
| 231 | Newark-On-Trent | East Midlands | 111 | 5% | -6% | -2% |
| 232 | Widnes | North West | 110 | 0% | 1% | 0% |
| 233 | Farnborough | South East - South | 110 | -3% | -4% | -7% |
| 234 | Aldershot | South East - South | 110 | 12% | 7% | -2% |
| 235 | East Ham | Greater London | 109 | 2% | -2% | 3% |
| 236 | Ballymena | Northern Ireland | 109 | 0% | -3% | - |
| 237 | Skegness | East Midlands | 109 | 6% | 1% | -1% |
| 238 | Dewsbury | Yorkshire & Humberside | 109 | -6% | 0% | 1% |
| 239 | Sittingbourne | South East - South | 109 | -2% | 1% | -5% |
| 240 | Walthamstow | Greater London | 109 | -4% | -3% | -1% |
| 241 | Cheapside | Greater London | 109 | 5% | 0% | 2% |
| 242 | Gyle | Scotland | 108 | 2% | 1% | -3% |
| 243 | Dorchester | South West | 108 | 3% | 3% | 0% |
| 244 | Newton Abbot | South West | 108 | 1% | 6% | -1% |
| 245 | Erdington | West Midlands | 107 | 0% | -4% | -3% |
| 246 | Weymouth | South West | 107 | 3% | 1% | -4% |
| 247 | Bishops Stortford | South East - North | 107 | 6% | 1% | 8% |
| 248 | Boscombe | South West | 107 | 18% | -1% | 0% |
| 249 | Chiswick | Greater London | 107 | 2% | 3% | -5% |
| 250 | Washington | North | 106 | 4% | 0% | 0% |

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Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|----------------------|------------------------|----------|------------------|------------------|------------------|
| 251 | Dover | South East - South | 106 | 20% | -5% | 4% |
| 252 | Crystal Peaks Centre | Yorkshire & Humberside | 106 | 28% | 7% | 0% |
| 253 | Bromsgrove | West Midlands | 106 | -2% | -3% | 5% |
| 254 | Stretford | North West | 106 | 0% | -2% | -1% |
| 255 | Farnham | South East - South | 106 | 2% | -3% | 1% |
| 256 | Motherwell | Scotland | 105 | 4% | -2% | -6% |
| 257 | Great Yarmouth | East Anglia | 105 | 1% | -7% | -5% |
| 258 | Bognor Regis | South East - South | 105 | 1% | -3% | -3% |
| 259 | Pontypridd | Wales | 105 | 3% | 0% | 5% |
| 260 | Skipton | Yorkshire & Humberside | 105 | 0% | 0% | -2% |
| 261 | Northfield | West Midlands | 105 | 2% | -1% | 1% |
| 262 | Newcastle-under-Lyme | West Midlands | 105 | -2% | 2% | -2% |
| 263 | Pontefract | Yorkshire & Humberside | 104 | 1% | -5% | 2% |
| 264 | Cirencester | South West | 104 | -4% | -3% | -2% |
| 265 | Worksop | East Midlands | 104 | -11% | 0% | 1% |
| 266 | Bridgend | Wales | 104 | -2% | 5% | 4% |
| 267 | Haywards Heath | South East - South | 104 | 0% | -2% | -1% |
| 268 | Lichfield | West Midlands | 103 | 0% | -1% | -2% |
| 269 | Leicester Fosse Park | East Midlands | 103 | - | - | - |
| 270 | Tonbridge | South East - South | 103 | 9% | -9% | -1% |
| 271 | Gravesend | South East - South | 102 | -4% | -1% | 1% |
| 272 | Chester-le-Street | North | 102 | 2% | 0% | 2% |
| 273 | The Fort | West Midlands | 102 | 4% | - | - |
| 274 | Hempstead Valley | South East - South | 102 | 0% | 0% | -1% |
| 275 | Penzance | South West | 102 | 6% | 12% | 0% |
| 276 | Bridgwater | South West | 101 | -2% | 18% | 10% |
| 277 | Neath | Wales | 100 | -5% | 7% | -1% |
| 278 | Yate | South West | 100 | 0% | -2% | 1% |
| 279 | Accrington | North West | 100 | -2% | 8% | -1% |
| 280 | Tooting | Greater London | 100 | 6% | -5% | 2% |
| 281 | Castleford | Yorkshire & Humberside | 100 | 2% | -1% | 3% |
| 282 | Redcar | North | 99 | 3% | -6% | 2% |
| 283 | Llanelli | Wales | 99 | 3% | 7% | -2% |
| 284 | Salford | North West | 99 | 0% | 1% | -1% |
| 285 | Ellesmere Port | North West | 99 | 1% | -1% | -7% |
| 286 | Northallerton | Yorkshire & Humberside | 98 | 4% | -8% | 1% |
| 287 | Newmarket | East Anglia | 98 | 4% | 0% | -1% |
| 288 | Beverley | Yorkshire & Humberside | 98 | 3% | -2% | -6% |
| 289 | Queensway | Greater London | 98 | 3% | 1% | -1% |
| 290 | Stockton-on-Tees | North | 98 | 11% | -9% | -10% |
| 291 | Woolwich | Greater London | 98 | 4% | -5% | -2% |
| 292 | Fleet | South East - South | 97 | 2% | 3% | 4% |
| 293 | Hinckley | East Midlands | 97 | 3% | -1% | -5% |
| 294 | Barnet | Greater London | 97 | -3% | -1% | -4% |
| 295 | Boston | East Midlands | 97 | -3% | -3% | 5% |
| 296 | Hatfield | South East - North | 96 | 1% | 5% | 0% |
| 297 | Oswestry | West Midlands | 96 | 1% | 7% | 0% |
| 298 | Perry Barr | West Midlands | 96 | 5% | -3% | 4% |
| 299 | Leigh | North West | 96 | -4% | -3% | -1% |
| 300 | Merthyr Tydfil | Wales | 95 | 19% | -13% | -1% |

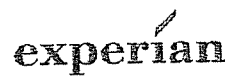
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Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|----------------------|--------------------|----------|------------------|------------------|------------------|
| 301 | Ormskirk | North West | 95 | 13% | -2% | -10% |
| 302 | Melton Mowbray | East Midlands | 95 | -3% | -4% | 0% |
| 303 | Holloway | Greater London | 95 | 15% | -7% | -1% |
| 304 | Clapham Junction | Greater London | 95 | 0% | -1% | -7% |
| 305 | Wilmslow | North West | 95 | 6% | -4% | -4% |
| 306 | Workington | North | 94 | 3% | -5% | -2% |
| 307 | Beeston | East Midlands | 94 | 3% | -1% | 3% |
| 308 | Stourbridge | West Midlands | 94 | -1% | 1% | -1% |
| 309 | Evesham | West Midlands | 94 | 8% | 1% | -3% |
| 310 | Lakeside Retail Park | South East - North | 94 | - | - | - |
| 311 | Blyth | North | 94 | 2% | -7% | 1% |
| 312 | Witney | South East - North | 94 | -1% | 2% | 2% |
| 313 | Halesowen | West Midlands | 93 | 3% | 0% | 0% |
| 314 | Gosport | South East - South | 93 | 0% | -1% | 2% |
| 315 | Dorking | South East - South | 93 | 7% | -5% | -1% |
| 316 | Dudley | West Midlands | 93 | -6% | -4% | -1% |
| 317 | Waltham Cross | South East - North | 93 | 0% | 5% | -1% |
| 318 | Stamford | East Midlands | 93 | 2% | 9% | -1% |
| 319 | Airdrie | Scotland | 93 | 4% | 11% | -11% |
| 320 | Hitchin | South East - North | 93 | 0% | -9% | -3% |
| 321 | Sutton-in-Ashfield | East Midlands | 92 | 2% | -1% | -2% |
| 322 | Colwyn Bay | Wales | 92 | 10% | -5% | -2% |
| 323 | Corby | East Midlands | 92 | 0% | 2% | 2% |
| 324 | Paignton | South West | 92 | -8% | 18% | -2% |
| 325 | Port Talbot | Wales | 92 | 21% | -4% | -5% |
| 326 | Edgware | Greater London | 91 | 7% | -9% | -2% |
| 327 | Ilkeston | East Midlands | 91 | 5% | -6% | -4% |
| 328 | Elgin | Scotland | 91 | 7% | -7% | -6% |
| 329 | Caerphilly | Wales | 91 | -1% | 0% | 4% |
| 330 | Barking | Greater London | 91 | 8% | -7% | 1% |
| 331 | Ashington | North | 91 | 2% | -8% | 2% |
| 332 | East Grinstead | South East - South | 90 | 7% | -2% | 5% |
| 333 | Abergavenny | Wales | 90 | -6% | 4% | 0% |
| 334 | Long Eaton | East Midlands | 90 | -6% | 1% | -5% |
| 335 | Clacton-on-Sea | South East - North | 89 | 4% | -4% | 3% |
| 336 | Victoria Street | Greater London | 89 | -9% | -1% | -10% |
| 337 | Newtownards | Northern Ireland | 89 | 1% | 0% | - |
| 338 | West Ealing | Greater London | 89 | 0% | 0% | -2% |
| 339 | Trowbridge | South West | 89 | -1% | 3% | -6% |
| 340 | Surrey Quays | Greater London | 89 | -1% | -1% | 0% |
| 341 | Cameron Toll | Scotland | 89 | -1% | 2% | 0% |
| 342 | Letchworth | South East - North | 89 | 5% | -3% | -3% |
| 343 | Liscard | North West | 88 | 20% | 3% | -8% |
| 344 | Coatbridge | Scotland | 88 | 9% | -3% | -1% |
| 345 | East Retford | East Midlands | 88 | 1% | -7% | -1% |
| 346 | Sudbury | East Anglia | 88 | 6% | -8% | -1% |
| 347 | Bletchley | South East - North | 88 | 8% | 2% | -6% |
| 348 | Peckham | Greater London | 88 | 3% | 3% | 7% |
| 349 | Cannock | West Midlands | 87 | -4% | -1% | -2% |
| 350 | Buxton | East Midlands | 87 | 7% | -7% | 1% |

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Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|------------------------|------------------------|----------|------------------|------------------|------------------|
| 351 | Wellingborough | East Midlands | 87 | 4% | -8% | -6% |
| 352 | Camden Town | Greater London | 87 | 8% | -5% | -1% |
| 353 | Coalville | East Midlands | 87 | 1% | 7% | -11% |
| 354 | North Shields | North | 87 | 3% | 5% | 0% |
| 355 | Selby | Yorkshire & Humberside | 86 | -3% | 6% | -2% |
| 356 | Loughton | South East - North | 86 | -1% | -1% | 2% |
| 357 | Felixstowe | East Anglia | 86 | 3% | -3% | -3% |
| 358 | Lymington | South East - South | 86 | -5% | 6% | -3% |
| 359 | Huntingdon | East Anglia | 86 | 6% | -6% | -4% |
| 360 | Alfreton | East Midlands | 86 | 7% | -7% | 0% |
| 361 | Shirley (Southampton) | South East - South | 85 | 1% | 8% | -1% |
| 362 | Sevenoaks | South East - South | 85 | 0% | -1% | -1% |
| 363 | Strand | Greater London | 85 | 9% | -12% | 3% |
| 364 | Waterlooville | South East - South | 84 | 0% | -2% | 4% |
| 365 | Shirley (Birmingham) | West Midlands | 84 | 3% | 1% | -8% |
| 366 | Aberystwyth | Wales | 84 | 1% | -2% | -4% |
| 367 | Kilburn | Greater London | 84 | 4% | -5% | -3% |
| 368 | London Road (Brighton) | South East - South | 84 | -6% | 1% | -3% |
| 369 | Bridlington | Yorkshire & Humberside | 84 | -2% | -3% | 0% |
| 370 | Chelmsley Wood | West Midlands | 83 | 2% | 0% | -1% |
| 371 | Hexham | North | 83 | -3% | -9% | 3% |
| 372 | Haverhill | East Anglia | 83 | 2% | -1% | 1% |
| 373 | Hampstead | Greater London | 83 | -2% | 1% | -3% |
| 374 | Newton Mearns | Scotland | 83 | 1% | 2% | 0% |
| 375 | Market Harborough | East Midlands | 83 | -6% | -2% | -1% |
| 376 | Folkestone | South East - South | 82 | 3% | -1% | -6% |
| 377 | St Andrews | Scotland | 82 | 4% | -7% | -5% |
| 378 | Burgess Hill | South East - South | 82 | -1% | 5% | -2% |
| 379 | Braintree | South East - North | 82 | -3% | -2% | 6% |
| 380 | Cumbernauld | Scotland | 82 | 4% | 11% | - |
| 381 | St Austell | South West | 81 | 0% | -2% | -3% |
| 382 | Middleton | North West | 81 | 2% | -3% | -1% |
| 383 | Wembley | Greater London | 81 | 1% | 6% | -9% |
| 384 | Hove | South East - South | 81 | 8% | -8% | -1% |
| 385 | Walton-on-Thames | South East - South | 81 | -3% | -8% | 0% |
| 386 | Wisbech | East Anglia | 81 | -4% | 3% | 0% |
| 387 | Whitehaven | North | 80 | -6% | 3% | -7% |
| 388 | Cross Gates | Yorkshire & Humberside | 80 | 0% | 7% | -1% |
| 389 | Borehamwood | South East - North | 80 | 11% | -10% | 2% |
| 390 | Winton | South West | 80 | -10% | 5% | -1% |
| 391 | Wokingham | South East - North | 80 | 0% | -7% | -5% |
| 392 | Billingham | North | 80 | 2% | 2% | -6% |
| 393 | Wallsend | North | 80 | 3% | -3% | 3% |
| 394 | Witham | South East - North | 80 | 1% | -5% | -1% |
| 395 | Hyde | North West | 80 | 5% | -4% | 1% |
| 396 | Dunstable | South East - North | 80 | -6% | -3% | -3% |
| 397 | Falmouth | South West | 79 | -3% | 7% | -4% |
| 398 | Spalding | East Midlands | 79 | 2% | -7% | 1% |
| 399 | Bicester | South East - North | 79 | 0% | -1% | 2% |
| 400 | Cowley | South East - North | 79 | 2% | -10% | 0% |

Which is the strongest financial institution in the UK?

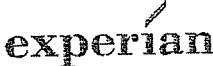
Which is the most powerful financial institution in the UK?

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Retail Centre Ranking 2001

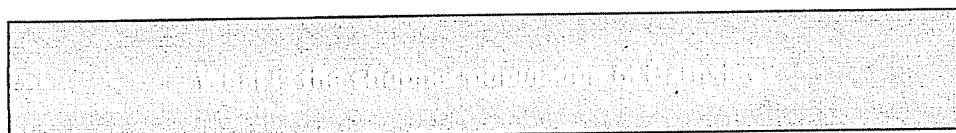
| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|--------------------------|--------------------|----------|---------------|---------------|---------------|
| 401 | Gateshead | North | 79 | -1% | 1% | 1% |
| 402 | Street | South West | 79 | -7% | -1% | 2% |
| 403 | Blackwood | Wales | 79 | 3% | -1% | -1% |
| 404 | Margate | South East - South | 79 | -7% | 4% | -1% |
| 405 | Exmouth | South West | 79 | -1% | 4% | -1% |
| 406 | Barry | Wales | 79 | 5% | -3% | -6% |
| 407 | Aberdare | Wales | 79 | 11% | -1% | -6% |
| 408 | Christchurch | South West | 78 | -4% | -1% | -1% |
| 409 | Bathgate | Scotland | 78 | 1% | 11% | -5% |
| 410 | Acocks Green | West Midlands | 78 | 11% | -5% | -3% |
| 411 | Weston Favell | East Midlands | 78 | 0% | -7% | 4% |
| 412 | Stratford | Greater London | 78 | -2% | -17% | 0% |
| 413 | Muswell Hill | Greater London | 78 | 8% | -2% | 1% |
| 414 | Sale | North West | 78 | 1% | -10% | 0% |
| 415 | Rutherglen | Scotland | 78 | 2% | -5% | -1% |
| 416 | Gillingham | South East - South | 78 | -1% | -2% | 1% |
| 417 | Devizes | South West | 78 | -4% | 10% | 0% |
| 418 | Abingdon | South East - North | 78 | -4% | -2% | -6% |
| 419 | Diss | East Anglia | 77 | 2% | 3% | -1% |
| 420 | Gainsborough | East Midlands | 77 | 10% | 3% | -2% |
| 421 | Enniskillen | Northern Ireland | 77 | 4% | 0% | - |
| 422 | Harborne | West Midlands | 77 | 7% | 0% | -8% |
| 423 | Kirkintilloch | Scotland | 77 | 3% | -1% | -4% |
| 424 | Berwick-upon-Tweed | North | 77 | -1% | 0% | -2% |
| 425 | Barkingside | Greater London | 77 | 2% | -4% | -1% |
| 426 | Fenchurch Street | Greater London | 77 | 10% | -10% | 10% |
| 427 | Finchley | Greater London | 77 | 4% | -2% | -12% |
| 428 | Beckenham | Greater London | 77 | 1% | -3% | -5% |
| 429 | Consett | North | 76 | -1% | -2% | 0% |
| 430 | Musselburgh | Scotland | 76 | 3% | -1% | -2% |
| 431 | Cramlington | North | 76 | 4% | -11% | -1% |
| 432 | Kingswood | South West | 76 | -1% | -2% | -1% |
| 433 | Shawlands | Scotland | 76 | 4% | -2% | -3% |
| 434 | Havant | South East - South | 76 | -4% | 5% | -3% |
| 435 | Stroud | South West | 76 | 1% | -2% | -3% |
| 436 | Dagenham | Greater London | 75 | 5% | 6% | - |
| 437 | Galashiels | Scotland | 75 | 1% | -5% | -2% |
| 438 | Peterlee | North | 75 | 0% | 1% | -1% |
| 439 | March | East Anglia | 75 | 4% | 3% | - |
| 440 | Fort William | Scotland | 75 | 2% | -6% | 7% |
| 441 | Winsford | North West | 75 | 2% | 4% | 0% |
| 442 | Petersfield | South East - South | 75 | 0% | -1% | -3% |
| 443 | Portadown | Northern Ireland | 75 | -1% | -8% | - |
| 444 | Brixton | Greater London | 75 | -2% | 4% | -4% |
| 445 | Holborn | Greater London | 75 | -12% | -1% | -7% |
| 446 | Arnold | East Midlands | 75 | 2% | -6% | -1% |
| 447 | Prescot Road (Liverpool) | North West | 75 | 7% | -1% | -14% |
| 448 | Ruislip | Greater London | 75 | -2% | -5% | -3% |
| 449 | Bridport | South West | 75 | 0% | 28% | - |
| 450 | Walworth Road | Greater London | 74 | -3% | -1% | -2% |

How can you tell if it's a good location? Well, it's a good location if it's a good location. It's a good location if it's a good location. It's a good location if it's a good location.



Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|--------------------------|------------------------|----------|------------------|------------------|------------------|
| 451 | Deal | South East - South | 74 | 13% | -8% | 0% |
| 452 | Chingford - Mount | Greater London | 74 | 1% | 3% | -1% |
| 453 | Morpeth | North | 74 | -3% | 4% | -2% |
| 454 | Bedworth | West Midlands | 74 | 1% | -2% | 0% |
| 455 | St Neots | East Anglia | 74 | 1% | 1% | -6% |
| 456 | Bulwell | East Midlands | 74 | 1% | 0% | -4% |
| 457 | Wigston | East Midlands | 74 | 0% | 2% | -1% |
| 458 | Sheldon | West Midlands | 74 | -8% | 0% | 0% |
| 459 | Dumbarton | Scotland | 74 | 2% | -9% | 2% |
| 460 | Newquay | South West | 74 | 2% | -3% | -5% |
| 461 | Helensburgh | Scotland | 74 | 1% | 0% | 0% |
| 462 | Alton | South East - South | 74 | 8% | 13% | - |
| 463 | Hillsborough | Yorkshire & Humberside | 73 | 8% | -8% | 2% |
| 464 | Rugeley | West Midlands | 73 | -2% | 0% | 0% |
| 465 | Fishponds | South West | 73 | 2% | 1% | 0% |
| 466 | Hornchurch | Greater London | 73 | 1% | 0% | -1% |
| 467 | Hertford | South East - North | 73 | 29% | -21% | 0% |
| 468 | Ely | East Anglia | 73 | 17% | -13% | -4% |
| 469 | Swinton | North West | 73 | 4% | 0% | 0% |
| 470 | London Road (Portsmouth) | South East - South | 73 | -4% | -2% | -4% |
| 471 | Guisborough | North | 73 | -3% | 2% | -1% |
| 472 | Stroud | South East - South | 73 | 1% | -2% | 1% |
| 473 | Wells | South West | 73 | 3% | -1% | -2% |
| 474 | Uttoxeter | West Midlands | 73 | 2% | 1% | -1% |
| 475 | Craigavon Centre | Northern Ireland | 73 | 22% | 4% | - |
| 476 | Huyton | North West | 73 | 2% | -1% | 4% |
| 477 | Hucknall | East Midlands | 73 | 2% | 10% | - |
| 478 | Cosham | South East - South | 73 | 6% | -3% | 5% |
| 479 | Canary Wharf | Greater London | 73 | 226% | -38% | - |
| 480 | Cleveleys | North West | 73 | -1% | 0% | -7% |
| 481 | Wythenshawe | North West | 73 | 18% | -3% | - |
| 482 | Runcorn Shopping City | North West | 73 | -9% | 0% | 1% |
| 483 | Grays | South East - North | 73 | 13% | -1% | - |
| 484 | Tiverton | South West | 72 | 2% | 1% | -1% |
| 485 | Southsea | South East - South | 72 | -4% | -3% | 4% |
| 486 | Stowmarket | East Anglia | 72 | 2% | 0% | 0% |
| 487 | Lewes | South East - South | 72 | 3% | -2% | -5% |
| 488 | Penrith | North | 72 | -2% | -5% | -3% |
| 489 | Alnwick | North | 72 | -4% | -3% | -1% |
| 490 | Peterhead | Scotland | 72 | 1% | -1% | -4% |
| 491 | Keynsham | South West | 71 | 1% | -3% | -1% |
| 492 | Skelmersdale | North West | 71 | 0% | 7% | - |
| 493 | Longton | West Midlands | 71 | 5% | 10% | - |
| 494 | Ross-on-Wye | West Midlands | 71 | 3% | -5% | 7% |
| 495 | Chorlton-cum-Hardy | North West | 71 | 0% | -2% | -1% |
| 496 | New Malden | Greater London | 71 | 0% | -7% | 0% |
| 497 | Bedminster | South West | 71 | 0% | -9% | -1% |
| 498 | Edmonton | Greater London | 71 | -7% | 6% | -4% |
| 499 | Rayleigh | South East - North | 71 | -5% | -2% | -1% |
| 500 | West Wickham | Greater London | 71 | -1% | -6% | -2% |

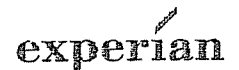


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Retail Centre Ranking 2001

| Rank | Centre | Region | Vitality | % Change 2001 | % Change 2000 | % Change 1998 |
|------|-----------------------------------|------------------------|----------|------------------|------------------|------------------|
| 501 | Bilston | West Midlands | 71 | 3% | 1% | -6% |
| 502 | Caterham | South East - South | 71 | 6% | -2% | -1% |
| 503 | Nantwich | North West | 71 | -6% | 6% | -4% |
| 504 | Wishaw | Scotland | 71 | 3% | 2% | -11% |
| 505 | Beckton Triangle & Gateway Retail | Greater London | 70 | 27% | -3% | - |
| 506 | Wellington | West Midlands | 70 | -6% | -3% | 0% |
| 507 | Leith | Scotland | 70 | -1% | -7% | -9% |
| 508 | Allerton Road (Liverpool) | North West | 70 | 3% | -1% | -3% |
| 509 | Brighouse | Yorkshire & Humberside | 70 | 2% | -2% | -3% |
| 510 | Monmouth | Wales | 70 | 0% | -5% | 0% |
| 511 | Beaconsfield | South East - North | 70 | 2% | -2% | -1% |
| 512 | Belle Vale | North West | 70 | 3% | -3% | -1% |
| 513 | Islington | Greater London | 70 | 8% | -19% | -10% |
| 514 | Montrose | Scotland | 70 | -2% | -6% | -2% |
| 515 | Swiss Cottage | Greater London | 70 | 3% | 10% | - |
| 516 | Sheerness | South East - South | 70 | 3% | 9% | - |
| 517 | Coleraine | Northern Ireland | 70 | 4% | -12% | - |

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APPENDIX C

The Rhiw Centre
Weekly Footfall

| 2000 W/E Sunday | Public Hols. | Weekly Total | 2001 W/E Sunday | Public Hols. | Weekly Total | % | 2002 W/E Sunday | Public Hols. | Weekly Total | % |
|--------------------|-----------------|------------------|--------------------|-----------------|------------------|----------------|--------------------|-----------------|----------------|---------------|
| 09-Jan-00 | g | 35,652 | 07-Jan-01 | g | 32,502 | 91.16% | 06-Jan-02 | g | 36,570 | 112.52% |
| 16-Jan-00 | | 32,400 | 14-Jan-01 | | 34,980 | 107.96% | 13-Jan-02 | | 35,076 | 100.27% |
| 23-Jan-00 | | 32,104 | 21-Jan-01 | | 31,620 | 98.49% | 20-Jan-02 | | 33,642 | 106.39% |
| 30-Jan-00 | | 31,506 | 28-Jan-01 | | 31,152 | 98.88% | 27-Jan-02 | | 34,594 | 111.05% |
| 06-Feb-00 | | 32,207 | 04-Feb-01 | | 33,624 | 104.40% | 03-Feb-02 | | 35,021 | 104.15% |
| 13-Feb-00 | | 34,680 | 11-Feb-01 | | 35,328 | 101.87% | 10-Feb-02 | | 34,434 | 97.47% |
| 20-Feb-00 | | 32,856 | 18-Feb-01 | | 33,348 | 101.50% | 17-Feb-02 | | 34,254 | 102.72% |
| 27-Feb-00 | | 39,516 | 25-Feb-01 | | 36,426 | 92.18% | 24-Feb-02 | | 35,610 | 97.76% |
| 05-Mar-00 | | 34,404 | 04-Mar-01 | | 37,332 | 108.51% | 03-Mar-02 | | 37,038 | 99.21% |
| 12-Mar-00 | | 32,328 | 11-Mar-01 | | 36,300 | 112.29% | 10-Mar-02 | * | 40,002 | 110.20% |
| 19-Mar-00 | | 32,840 | 18-Mar-01 | | 33,613 | 102.35% | 17-Mar-02 | | | 0.00% |
| 26-Mar-00 | | 33,450 | 25-Mar-01 | | 34,632 | 103.53% | 24-Mar-02 | | | 0.00% |
| 02-Apr-00 | | 34,314 | 01-Apr-01 | | 33,394 | 97.32% | 31-Mar-02 | | | 0.00% |
| 09-Apr-00 | | 32,622 | 08-Apr-01 | | 33,318 | 102.13% | 07-Apr-02 | | | 0.00% |
| 16-Apr-00 | | 31,056 | 15-Apr-01 | | 35,694 | 114.93% | 14-Apr-02 | | | 0.00% |
| 23-Apr-00 | | 32,484 | 22-Apr-01 | a | 30,492 | 93.87% | 21-Apr-02 | | | 0.00% |
| 30-Apr-00 | a | 30,276 | 29-Apr-01 | | 34,026 | 112.39% | 28-Apr-02 | | | 0.00% |
| 07-May-00 | b | 29,880 | 06-May-01 | | 35,022 | 117.21% | 05-May-02 | | | 0.00% |
| 14-May-00 | | 33,300 | 13-May-01 | b | 26,982 | 81.03% | 12-May-02 | | | 0.00% |
| 21-May-00 | | 31,296 | 20-May-01 | | 32,588 | 104.13% | 19-May-02 | | | 0.00% |
| 28-May-00 | | 32,448 | 27-May-01 | | 35,733 | 114.18% | 26-May-02 | | | 0.00% |
| 04-Jun-00 | c | 30,996 | 03-Jun-01 | c | 32,076 | 103.48% | 02-Jun-02 | | | 0.00% |
| 11-Jun-00 | | 32,142 | 10-Jun-01 | | 33,360 | 103.79% | 09-Jun-02 | | | 0.00% |
| 18-Jun-00 | | 35,628 | 17-Jun-01 | | 35,310 | 99.11% | 16-Jun-02 | ** | | 0.00% |
| 25-Jun-00 | | 31,152 | 24-Jun-01 | | 34,618 | 111.13% | 23-Jun-02 | | | 0.00% |
| 02-Jul-00 | | 33,468 | 01-Jul-01 | | 32,844 | 98.14% | 30-Jun-02 | | | 0.00% |
| 09-Jul-00 | | 33,462 | 08-Jul-01 | | 34,278 | 102.44% | 07-Jul-02 | | | 0.00% |
| 16-Jul-00 | | 30,636 | 15-Jul-01 | | 34,068 | 111.20% | 14-Jul-02 | | | 0.00% |
| 23-Jul-00 | | 32,274 | 22-Jul-01 | | 34,956 | 108.31% | 21-Jul-02 | | | 0.00% |
| 30-Jul-00 | | 32,844 | 29-Jul-01 | | 36,144 | 110.05% | 28-Jul-02 | | | 0.00% |
| 06-Aug-00 | | 30,930 | 05-Aug-01 | | 37,560 | 121.44% | 04-Aug-02 | | | 0.00% |
| 13-Aug-00 | | 33,048 | 12-Aug-01 | | 36,150 | 109.39% | 11-Aug-02 | | | 0.00% |
| 20-Aug-00 | | 34,296 | 19-Aug-01 | | 37,782 | 110.16% | 18-Aug-02 | | | 0.00% |
| 27-Aug-00 | | 38,628 | 26-Aug-01 | | 37,668 | 97.51% | 25-Aug-02 | | | 0.00% |
| 03-Sep-00 | d | 31,722 | 02-Sep-01 | d | 38,832 | 122.41% | 01-Sep-02 | | | 0.00% |
| 10-Sep-00 | | 37,076 | 09-Sep-01 | | 42,016 | 113.32% | 08-Sep-02 | | | 0.00% |
| 17-Sep-00 | | 31,998 | 16-Sep-01 | | 35,268 | 110.22% | 15-Sep-02 | | | 0.00% |
| 24-Sep-00 | | 32,010 | 23-Sep-01 | | 36,948 | 115.43% | 22-Sep-02 | | | 0.00% |
| 01-Oct-00 | | 34,468 | 30-Sep-01 | | 38,244 | 110.96% | 29-Sep-02 | | | 0.00% |
| 08-Oct-00 | | 34,481 | 07-Oct-01 | | 35,844 | 103.95% | 06-Oct-02 | | | 0.00% |
| 15-Oct-00 | | 32,238 | 14-Oct-01 | | 35,820 | 111.11% | 13-Oct-02 | | | 0.00% |
| 22-Oct-00 | | 32,537 | 21-Oct-01 | | 36,024 | 110.72% | 20-Oct-02 | | | 0.00% |
| 29-Oct-00 | | 34,481 | 28-Oct-01 | | 36,522 | 105.92% | 27-Oct-02 | | | 0.00% |
| 05-Nov-00 | | 33,828 | 04-Nov-01 | | 35,448 | 104.79% | 03-Nov-02 | | | 0.00% |
| 12-Nov-00 | | 35,514 | 11-Nov-01 | | 38,126 | 107.35% | 10-Nov-02 | | | 0.00% |
| 19-Nov-00 | | 36,264 | 18-Nov-01 | | 39,426 | 108.72% | 17-Nov-02 | | | 0.00% |
| 26-Nov-00 | e | 40,488 | 25-Nov-01 | e | 44,311 | 109.44% | 24-Nov-02 | | | 0.00% |
| 03-Dec-00 | | 45,414 | 02-Dec-01 | h | 50,460 | 111.11% | 01-Dec-02 | | | 0.00% |
| 10-Dec-00 | | 44,514 | 09-Dec-01 | | 49,169 | 110.46% | 08-Dec-02 | | | 0.00% |
| 17-Dec-00 | | 48,150 | 16-Dec-01 | | 52,020 | 108.04% | 15-Dec-02 | | | 0.00% |
| 24-Dec-00 | | 54,302 | 23-Dec-01 | | 66,204 | 121.92% | 22-Dec-02 | | | 0.00% |
| 31-Dec-00 | f | 31,380 | 30-Dec-01 | f | 39,924 | 127.23% | 29-Dec-02 | | | 0.00% |
| | | 1,791,988 | | | 1,915,526 | 106.89% | | | 356,241 | 18.60% |

- E.G. [a] Easter Monday
 [b] May Bank Holiday
 [c] Spring Bank Holiday
 [d] August Bank Holiday
 (e) Start Christmas Sunday Trading
 (f) Xmas Day/Boxing Day
 (g) New Years Day
 (h) Xmas Festival
 * Classic Crank up
 Summer Fayre
 ** (Royal Visit)