

LOCATIONS & ANALYTICS



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LOCATIONS & ANALYTICS

We provide a scientific approach to location research and data analytics in the retail and ecommerce sectors.

Javelin Group's Locations & Analytics team helps retailers and brands to optimise their retail store portfolios, and shopping centre, and travel hub developers and owners to optimise their investments.

With over 25 years' experience, our team goes well beyond the traditional scope of location analysis, combining and analysing data from a wide variety of sources (including our own proprietary insight tools) to deliver high-quality, fact-based, actionable evaluations of store portfolios and retail-led developments.

In the last few years, we have delivered location strategy work to more than 210 leading retailers and more than 250 shopping centre developments. We also deliver wider analytic solutions to our clients, both through bespoke project engagements and by deploying market leading data and software within client organisations.

1 Store Location Planning

We help retailers to optimise their 'shape of chain' - the strategic development and transition of store estates, informed by a deep understanding of the drivers of variable store performance and the rapid changes that are reshaping the way consumers shop.

2 Shopping Centre Strategy

We advise on the commercial viability of new schemes, commercial due diligence to inform acquisition appraisals, and on how to optimise sales and rental revenues in existing schemes through optimised tenant mix and marketing.

3 Airport & Travel Retail

We assess the commercial trading potential and optimum category and tenant mix of retail developments in major travel hubs.

4 Retail Analytics Software

We provide a variety of market leading business insight software tools to retailers seeking to derive actionable insight from their data assets.

5 Customer Analytics

We help retailers to understand their retail customers through profiling, segmentation, analytics and shopping centre hosts to optimise promotional activity.

6 Location & Consumer Data

Our understanding of retail locations is informed by a range of proprietary data sets, including VENUESCORE, SHOPSCORE and RETAILNATION.

7 Mobile Marketing & Payments

With smartphones and tablets driving the digital revolution in retail, Javelin Group and Paythru have combined their expertise to offer Ignite, a new m-Commerce proposition for contextual mobile marketing and payments.



PRACTICE DIRECTOR



Robin Bevan, Director of Locations & Analytics
robin.bevan@javelingroup.com | +44 (0)20 7961 3237

Robin leads Javelin Group's Locations & Analytics practice. With 25 years' experience working with retailers, brands, private equity and shopping centre communities across all areas of retail property research, he brings a unique breadth of experience to client engagements.

1 STORE LOCATION PLANNING

We assess store performance and roll-out potential of retail businesses across all sizes, sectors and venues.

Underpinned by our unique insight into Europe’s retail geography, Javelin Group’s Locations & Analytics team brings a detailed understanding of retail venues across the region.

This allows us to assess retail store performance dynamics and roll-out potential for retail businesses of all sizes trading in all sectors (fashion, beauty, leisure goods, bulky goods, foodservice etc.) and across all venue types (high streets, malls, retail parks, transport hubs and mixed use).

Our work helps retailers to open the right stores (size, pitch) in the right venues, to maximise sales and profit return. We call this ‘shape of chain’.

Our engagements cover:

- Catchment analysis
- Store performance drivers
- Sales and profit forecasts in new venues
- Roll-out strategy and shape of chain
- Store portfolio investment prioritisation
- Micro and macro space planning
- Optimal local ranging
- Customer analysis and segmentation
- International expansion
- Due diligence of management plans

Selected location strategy clients:

Accessorize	Cath Kidston	Marks & Spencer	Robert Dyas
Alain Afflelou	Côte	Matalan	Sainsbury’s
American Golf	Ernest Jones	McDonald’s	Schuh
Ann Summers	Evans Cycles	Monsoon	Screwfix
Austin Reed	Fat Face	Morrisons	Selco
Bathstore.com	Feather & Black	Mothercare	Sony
Bensons for Beds	Fenwick	New Look	Tesco
Boden	Goldsmiths	Nike	Thiele
Bonmarché	H. Samuel	Oakley	Timberland
Boots	Harveys	Office	TK Maxx
BrightHouse	Homebase	Pets at Home	Vision Express
Buildbase	Itsu	Phase Eight	Wagamama
ByBox	JD Sports	Pho	Waitrose
Byron	Kurt Geiger	Plumbase	WHSmith
Carptright	Levi Strauss	Poundland	
Carphone Warehouse	Maplin	Pret a Manger	



“The team were flexible in their approach and integrated well with our own senior management. They also had a clear vision of the impact of multi-channel retailing on the UK high street, to give us the right strategic direction. They were a pleasure to work with and I have no hesitation in recommending them.” **Grahame Smith, Group Property Director, Carphone Warehouse.**

KEY CONTACT



Paul Matthews, Consulting Manager, Store Location Planning
paul.matthews@javelingroup.com | +44 (0)20 7961 3233

Paul leads the day-to-day delivery of our store location planning projects for retailers and brands. He is a graduate of Leeds University where he gained a First Class degree in Geography & Transport Planning.

2 SHOPPING CENTRE STRATEGY

We assess the commercial trading potential and optimum tenant mix for existing and planned shopping centres.

Our retail shopping centre specialists harness Javelin Group’s deep retail sector expertise and unique insight, to advise on retail property developments and acquisitions across Europe. Our team has advised on over 250 schemes including many well-known developments such as Bluewater, Athens Mall, Buchanan Galleries, Bullring, Cabot Circus, Highcross Leicester, Westfield Stratford, Silverburn, Zakopianka, Battersea Power Station and London Designer Outlet.

Our strength lies in our unrivalled understanding of store retailing and its performance metrics (local market spending, catchments, trading densities, sustainable rents), and in our use of robust analytical tools to deliver a comprehensive assessment of the commercial trading potential and optimum tenant mix for shopping centres, both planned and existing.

Javelin Group’s understanding of changing consumer shopping behaviour and inside knowledge of how retailers are adapting their shape of chain allows us to provide a well-informed view on what will make a successful shopping centre.

Our expertise covers:

- Commercial feasibility studies for new/extended schemes
- Optimised category and tenant mix and marketing strategy
- Proactive asset strategies
- Sales potential and sustainable rents
- Pre-acquisition due diligence
- Strategic market studies
- Marketing and promotions optimisation

Selected shopping centre developer/owner clients:

BAA Heathrow	Henderson	Milligan	The Crown Estate
BlackRock	Hermes	Network Rail	TIAA-CREF
Capital & Regional	InfraRed Capital	Oaktree Capital	Tristan Capital
Centros	Kennedy Wilson	PIMCO	Westfield
Clearance Capital	Land Securities	Queensberry Real Estate	Zorlu Group
Dimand	Lend Lease	Quintain Estates	
Ellandi	M&G Real Estate	Resolution Property	
Grosvenor	Majid-Al-Futtaim	Rockspring	
Hammerson	Meyer Bergman	Spennyhill (Tesco)	

Selected shopping centre developments:

Abu Dhabi, Saadiyat Island	Glasgow, Silverburn	London, Westfield London
Athens, Athens Mall	High Wycombe, Eden	Merthyr Tydfil, Cyfarthfa RP
Barcelona, Anecblau	Istanbul, Zorlu Center	Milton Keynes, CentreMK
Birmingham, Bullring	Krakow, Zakopianka	Newport, Friars Walk
Birmingham, Grand Central	Liverpool, Liverpool ONE	Stoke, City Central
Bristol, Cabot Circus	London, Battersea Power Station	West Bromwich, New Square



“Hammerson has sought Javelin Group’s advice about the future of retail not only because of their extensive experience working on shopping centre and retailer location strategy projects but also because of their wider first-hand experience of working with retailers on the key issues that are defining how retail is changing.” **Stephen Brown, Group Marketing Director, Hammerson.**

KEY CONTACT



Andrew Leung, Associate Director, Shopping Centre Strategy

andrew.leung@javelingroup.com | +44 (0)20 7961 3217

As one of UK’s leading retail property researchers, Andrew specialises in the shopping centre sector and leads project delivery for our developer-owner client base. Previously in the shopping centre division at Management Horizons Europe and, before that, at WHSmith.

3 AIRPORT & TRAVEL RETAIL

We advise on retail developments at airports and travel termini, to optimise returns.

Javelin Group’s team of experienced airport and travel retail consultants draw on their extensive knowledge in retail and shopping centre developments, to advise on airport retail developments and other travel termini retail developments across the world.

A number of the world’s leading airport and train station operators (including BAA and Network Rail) have repeatedly used our team as key advisors in retail category demand planning and space management to optimise returns from their assets.

Our use of robust analytical tools delivers a comprehensive assessment of the commercial trading potential and optimum tenant mix for retail developments at airport and travel termini, both planned and existing:

- Performance audits using best practice international benchmarks and original retail consumer research
- Forecasting optimal space demands and revenue potential
- Tenant mix and retail category planning
- Acquisition due diligence
- Masterplanning

Our airport and travel termini clients include:

- Aena
- Aer Rianta
- Aeroporto di Bologna
- Aéroports de Paris
- Avinor
- BAA Heathrow
- British Airways
- Copenhagen Airport
- Dublin Airport Authority
- Düsseldorf International
- Network Rail
- Newcastle Airport
- Rail Delivery Group
- St Pancras International
- Transport for London



“I just wanted to thank Javelin Group for all the hard work and effort that went into producing Network Rail’s Space Optimisation Model...I’m sure we will be working together again soon.” **Daniel Charles, Retail Operations Manager, Network Rail.**

KEY CONTACT



Alex Evered, Consulting Manager, Airport & Travel Retail

alex.evered@javelingroup.com | +44 (0)20 7961 3242

Alex leads the delivery of our client engagements in the travel sector, where we work with clients such as Arup, BAA Heathrow, Network Rail and HS1, as well as many leading international airport operators. He has a wealth of experience gained from his time with Pragma Consulting, DTZ and Sainsbury’s.

4 RETAIL ANALYTICS SOFTWARE

We provide market leading analytics and business insight software tools for the retail and ecommerce sectors.

Today’s omni-channel retailers generate volumes of data about their customers, products, prices, stock levels and channels, and few retailers make the most effective use of the insights this data generates. Companies are often constrained by expensive, rigid and highly centralised business information solutions.

Recent breakthroughs in data analytics technology ensure that the coming retail era will be both nimble and smart, with tomorrow’s retailers supporting smart decision-making at all levels of the enterprise. This will transform all of the key retail disciplines, from category management to store management, and from financial planning to customer insight: all will soon be based on fast, rigorous analysis and rational decision-making.

To respond to this transformational change, Javelin Group partners with best-in-class software providers to bring market-leading analytics and business insight software to the UK’s retail and ecommerce sectors:

 **Alteryx:** High performance, flexible desktop tool, revolutionising retail and ecommerce analytics and retail location planning, allowing all sources of transactional, customer, channel and spatial data to be analysed at lightning speeds in one tool without requiring specialist skills.



Javelin Group Analytics Gallery: Bespoke wizards designed around your role to automate regular analytical/business insight reports, accessible within your own private web-based analytical studio.



Tableau: Brings data to life through ‘visual analytics’ combining graphs, tables and maps in an easy-to-use, dashboard environment.



“Working with Javelin Group has transformed our approach to retail store planning. We can now produce consistent store appraisals utilising multiple sources of data quickly and easily. We’re very pleased to be using Alteryx and working with Javelin Group.” **Gordon Forsyth, Group Property Director, Steinhoff International.**

KEY CONTACT



Carl Bradbrook, Associate Director, Retail Analytics Software

carl.bradbrook@javelingroup.com | +44 (0)20 7961 1328

Carl leads our Retail Analytics Software service line and manages our key partner relationships. Carl has many years of experience across a wide range of industry sectors, specialising in location planning, GIS, and customer analytics.

5 CUSTOMER ANALYTICS

We help our clients to better understand their retail customers through profiling, segmentation and analytics.

Understanding customers is central to any retail location-based project or marketing campaign. By utilising various in-house data sets and industry partnerships, we can help reveal your retail customers' key characteristics and how they interact with your retail business. An integrated data solution to ensure maximum customer profitability can be delivered using a multitude of variables, which includes demographics, lifestyle, attitudes and behaviours, economic and social considerations, and retail spending.

Data is available at the individual and household level, or aggregated to various geographic boundaries to provide deep insight to support all strategic analysis and customer understanding. Javelin Group can help you answer these key business questions:

Customer Profiling and Segmentation

- What are my customers' lifestyle/demographic characteristics?
- How financially stable are my customers?
- What levels of disposable income do my customers have?
- Which customer types spend the most?
- How frequently do different customers spend?
- Can I better understand customer journey mapping?
- Can I segment my customers into a manageable/actionable number of groups?

Customer Analytics

- How far do my customers travel to reach their preferred store?
- What products do different customer types purchase?
- How can I better understand basket spend?
- How can I cross-sell new products/services?
- How can I find more of my key customers (acquisition)?
- How can I understand when a customer is likely to switch to a competitor (churn)?
- What are the best channels to use to engage customers?
- What strategies should be adopted to retain customers?
- What is the average lifetime value for my customers?
- How can I understand the level of customer loyalty?

We also offer audits on data quality to evaluate the cleanliness of your retail customer data and data insight reports to identify the key customer characteristics.



"The marketing campaign using Javelin Group data gave remarkable and unprecedented results. I was very pleased with the insight this project delivered and would recommend the team at Javelin Group." **Adam Blackwell, Business Development Manager, Citroën UK.**

KEY CONTACT



Stephen Hoad, Consulting Manager, Customer Analytics

stephen.hoad@javelingroup.com | +44 (0)20 7961 3238

Stephen leads customer data analytics and modelling within the Locations & Analytics practice. Before joining Javelin Group in 2004, Stephen worked with the RAF and at Mars Consulting, a strategy practice. Stephen graduated in 1998 from Cambridge University with a degree in Engineering.

6 LOCATION & CONSUMER DATA

We provide proprietary data sets to inform retail location planning decisions.

Our understanding of retail locations is informed by a range of proprietary data sets.

VENUESCORE  **VENUESCORE** ranks retail venues in all major European countries.

SHOPSCORE  **SHOPSCORE** gives retailers a mechanism for benchmarking store performance.

SITESCORE  **SITESCORE** is a unique indicator of site quality in UK retail venues.

RETAILNATION  **RETAILNATION** is an evaluation of UK retail catchments and shopping patterns.

CONSUMERSCORE  **CONSUMERSCORE** provides an up-to-date view of lifestyle, demographic and geographic data.

PERSONICX  **PERSONICX** is a unique consumer segmentation based on behaviour and attitudes.

X-SPEND  **X-SPEND** is a geographic model of spend demand that incorporates channel mix and future projections.

We combine these data sets with relevant external market and demographic data to gain a 360 degree perspective of demand. Our data sets are used in our project work and they can also be licensed as standalone products.

This data is also highly relevant to many other sectors including leisure, foodservice, consumer goods, financial services, telecommunications, utilities, automotive and the public sector.



“Javelin Group's insight tools and expertise provide an invaluable source of up to date information for local authorities wanting to get a clear understanding of their local residents and retail venues. The data reflects real trends based on large sample actual consumer data, allowing decision makers to be confident in their business recommendations.” **Patrick Bowes, Chief Economist, Leeds City Council.**

KEY CONTACT



Paddy Gamble, Consulting Manager, Location & Consumer Data

paddy.gamble@javelingroup.com | +44 (0)20 7961 3278

Paddy leads the development of our data insight products. He has worked on a wide range of retail locations projects and shopping centre projects for clients including Henderson Global Investors, Morrisons, Capital & Regional, InfraRed Capital and Milligan.



7 MOBILE MARKETING & PAYMENTS

We have combined expertise with Paythru to offer Ignite, a new m-Commerce proposition for mobile marketing and payments.

Ignite enables a wide range of customer journeys (promotions, click & collect, clienteling, wayfinding, queue-busting...) by combining five key features:

1. **Precise geo-location:** Enables real-time tracking without battery drain and allows place relevant promotions.
2. **Optimised customer targeting:** Targets consumers by demographic or segment, past behaviour, stated preferences, time period etc.
3. **Mobile payment:** m-Commerce device that allows the consumer to make a payment with what is in their 'real' wallet e.g. cards, vouchers, coupons, virtual wallets etc.
4. **Flexible custom front-end:** This can be a stand-alone app or integrated with other/existing apps. This is a white label platform and can be rebranded as required.
5. **Easy-to-use dashboard:** The host can manage promotions placed on the platform, see click throughs and redemptions etc.

Ignite delivers much higher ROI than traditional promotional methods (including paid search/SEM).

- Typical achieved click-through rates of 25-30%
- Typical overall redemption rate of 6-10%
- 40x more effective than traditional (search-based) mobile advertising
- 200x more effective than web-based marketing for brick and mortar stores

Ignite is suitable for retailers, shopping centre owners, town centre managers, travel hub operators, event destinations and many others.

For example, a retailer or shopping centre owner can use Ignite to engage customers:

	<p>AT HOME OR WORK</p> <p>"Hello Robyn. It's going to be hot today; here are the barbecue deals in your nearest store..."</p>
	<p>IN VICINITY OR CATCHMENT AREA</p> <p>"Hello Marco. Shop with us in the next 10 minutes and get 30% off your next purchase..."</p>
	<p>AT STORE ENTRANCE OR NEAR STORE</p> <p>"Hello Emma. Drop in today for £10 off any pair of shoes..."</p>
	<p>IN STORE</p> <p>"Hello Becky. Spend £50 or more on womenswear by 2pm and get a free £10 voucher..."</p>

Examples of promotional messages and mobile screens using Ignite:



OUR CLIENTS

We have delivered location strategy work to more than 210 leading retailers and more than 250 shopping centre developments.

RETAILERS



BRANDS



SHOPPING CENTRE OWNERS AND TRAVEL



OTHER



WHITE PAPERS



How many stores will we really need? UK non-food retailing in 2020.

In this White Paper, Javelin Group has assessed the long term future of retailing in the four largest non-food sectors to understand how much and what kinds of store space will be required by 2020 and what retailers must do to ensure they are well-positioned.

Register at www.javelingroup.com to download this white paper.



Battlefield Britain: Survivors and casualties in the fight for the high street.

Battlefield Britain seeks to identify town centres that are most at risk of long-term decline, and those that will defend themselves robustly, assessing these venues across a comprehensive range of “stress indicators” (i.e. not just multi-channel threat in isolation).

Register at www.javelingroup.com to download this white paper.



VENUESCORE™ 2013-14: UK shopping venue annual rankings from Javelin Group.

VENUESCORE is an annual survey compiled by Javelin Group, which ranks the UK's top 2,000 retail venues including town centres, stand-alone malls, retail warehouse parks and factory outlet centres.

Register at www.javelingroup.com to download this executive summary.



Shape of Chain Survey: Retail industry trade research on future retail property.

This survey provides a snapshot of industry sentiment towards retail property and gauges current market views on issues such as expected regional differences, format evolution and the impact of multi-channel on store performance.

Register at www.javelingroup.com to download this survey.

ABOUT JAVELIN GROUP

We are Europe's leading ecommerce and omni-channel retail consultancy.

Javelin Group is Europe's leading specialist firm of ecommerce and omni-channel retail consultants and systems integrators. We advise leading retailers in the UK, Europe and the rest of the world on their strategies, operations, and technologies, and we develop large-scale ecommerce solutions. We also advise on store locations and formats, and on retail acquisitions and disposals.

With retail changing faster and more profoundly than at any time in its history, we work with our clients to anticipate and respond to these changes in customer shopping habits, retail technologies and the competitive environment, to help them to thrive in the coming decade.

We are a vertical retail specialist, which means we operate exclusively in the retail and consumer sector, and cover all retail disciplines from strategy planning to operational and technology implementation. We have extensive experience across all retail categories including grocery, clothing, consumer electronics, home, luxury goods, and services, and all retail channels and formats from omni-channel chain stores and department stores to pure player ecommerce.

Selected Javelin Group clients:



Sir Geoffrey Mulcahy, Chairman

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



Tony Stockil, CEO

tony.stockil@javelingroup.com
 Since founding Javelin Group, Tony Stockil has managed a wide range of projects for some of Europe's leading retailers, with a primary focus on strategy and omni-channel retailing. He has worked in the retail sector for many years, has an MBA from Harvard Business School, and a background in corporate strategy.

For further information about Javelin Group, please visit our website at www.javelingroup.com

Robin Bevan, Director

robin.bevan@javelingroup.com

Andrew Leung, Associate Director

andrew.leung@javelingroup.com

Carl Bradbrook, Associate Director

carl.bradbrook@javelingroup.com

Alex Evered, Consulting Manager

alex.evered@javelingroup.com

Paul Matthews, Consulting Manager

paul.matthews@javelingroup.com

Paddy Gamble, Consulting Manager

paddy.gamble@javelingroup.com

Stephen Hoad, Consulting Manager

stephen.hoad@javelingroup.com

Javelin Group Ltd
200 Aldersgate Street
London EC1A 4HD
United Kingdom

+44 (0)20 7961 3200
www.javelingroup.com

Javelin Group SAS
23 rue de Berri
75008 Paris
France

+33 (0)1 70 38 29 00
www.javelingroup.com

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Registered address: 1 Bickenhall Mansions, Bickenhall Street, London W1U 6BP. VAT registration number: 701931170.
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