

# Birmingham

10 April 2019





BROADSTREET BRUMMIE BULLRING BRUMMIE BALTI  
**FIND YOUR AMAZING**  
 BRUMMIE BULLRING BOBOWLER BIRMINGHAM BOUNTIFUL  
 BALTI BEST BUZZ BOBOWLER BARMY BUZZ  
 BLOKE BRUM BLABBERIN'



BRUM BALTI BONKERS BIRMINGHAM BUSTLING  
 BARMY BUZZ BRUMMIE BUZZ BOUNCING BABY  
**HELLO BRUM**  
 BLARTIN' BOUNTIFUL  
 BALTI BABY BROADSTREET  
 BOBOWLER BLABBERIN' BOUNCING  
 BONKERS BROADSTREET BALTI BABY BEAUTIFUL BLARTIN'

ESCALATORS



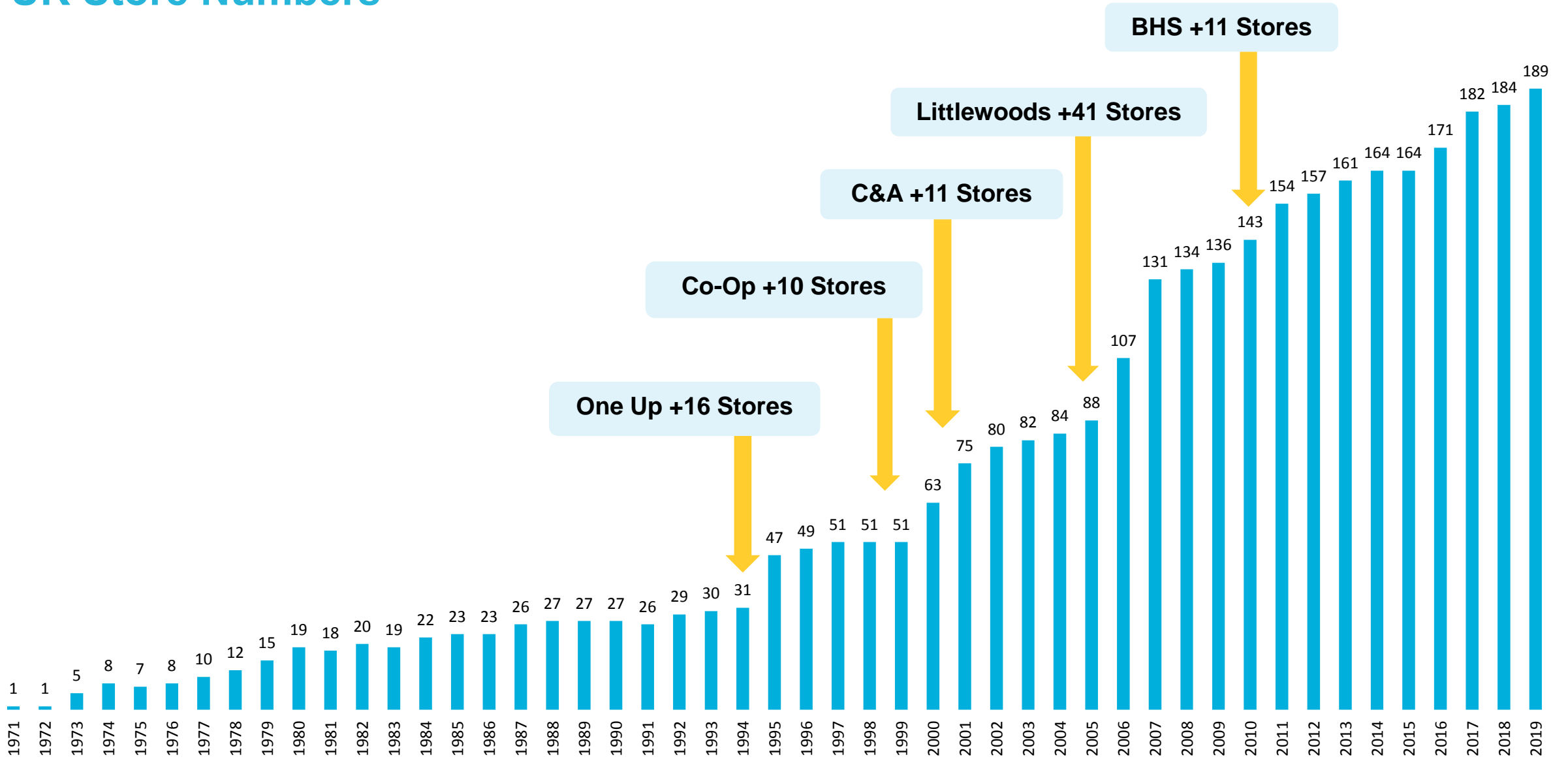




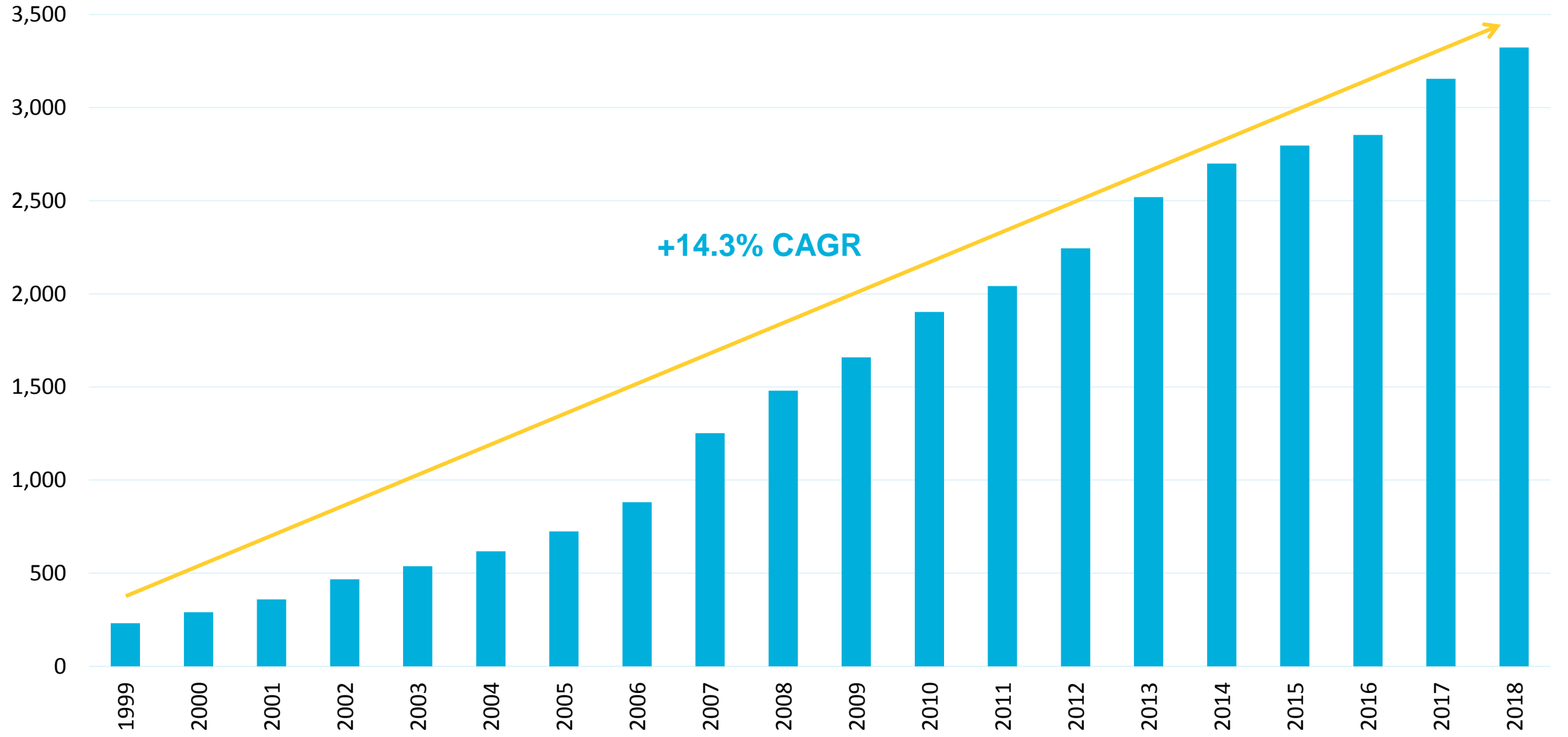
➤ Our UK Business

➤ Birmingham

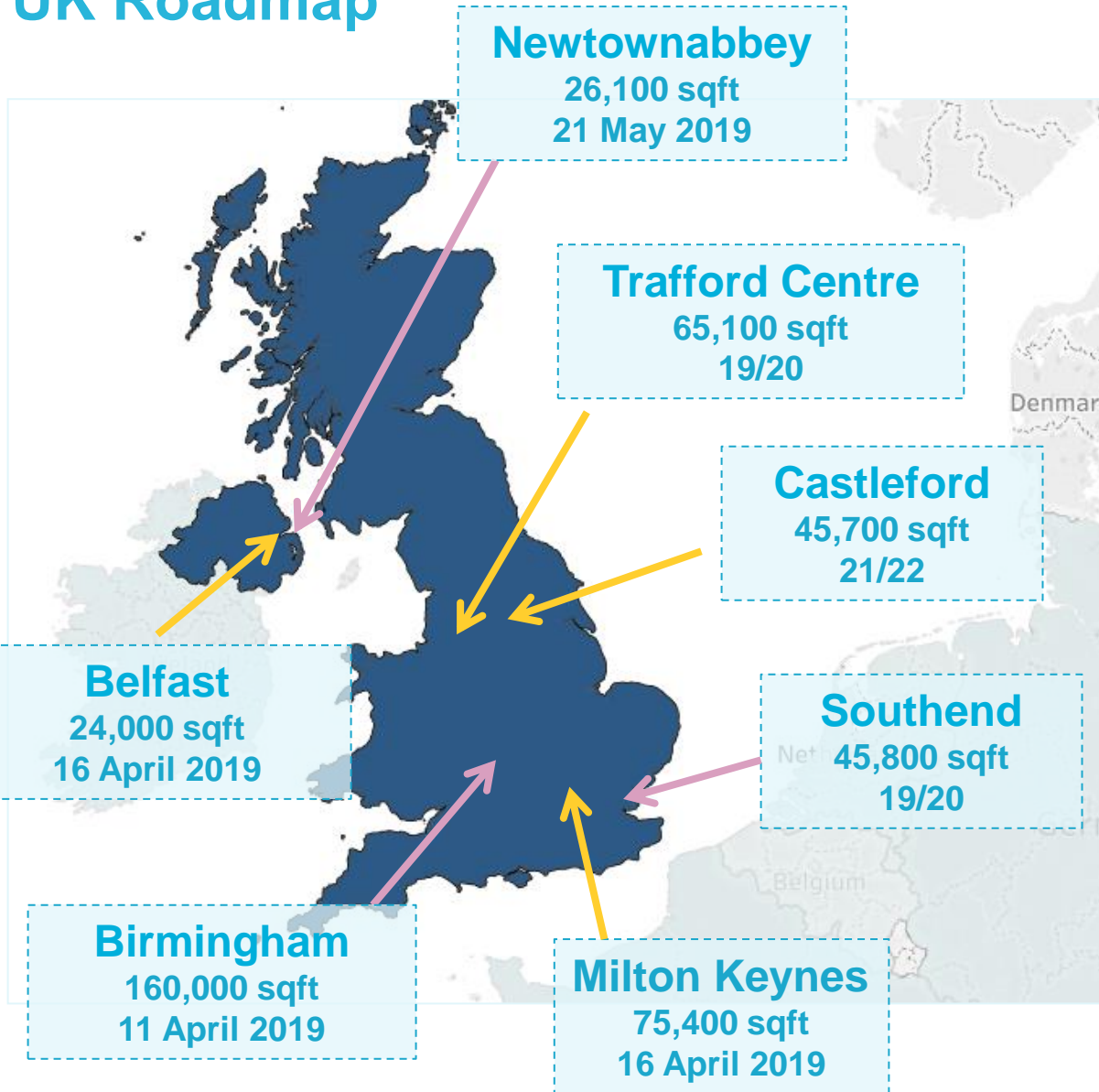
# UK Store Numbers



# 20 Years of UK Sales £m



# UK Roadmap



18/19 Refurbishments	Sqft k
Aberdeen	63
Bedford	29
Eastbourne	35
Glasgow - Argyle Street	70
Hull	60
Lincoln	35
London - Woodgreen	63
Motherwell	19
Newtownards	13

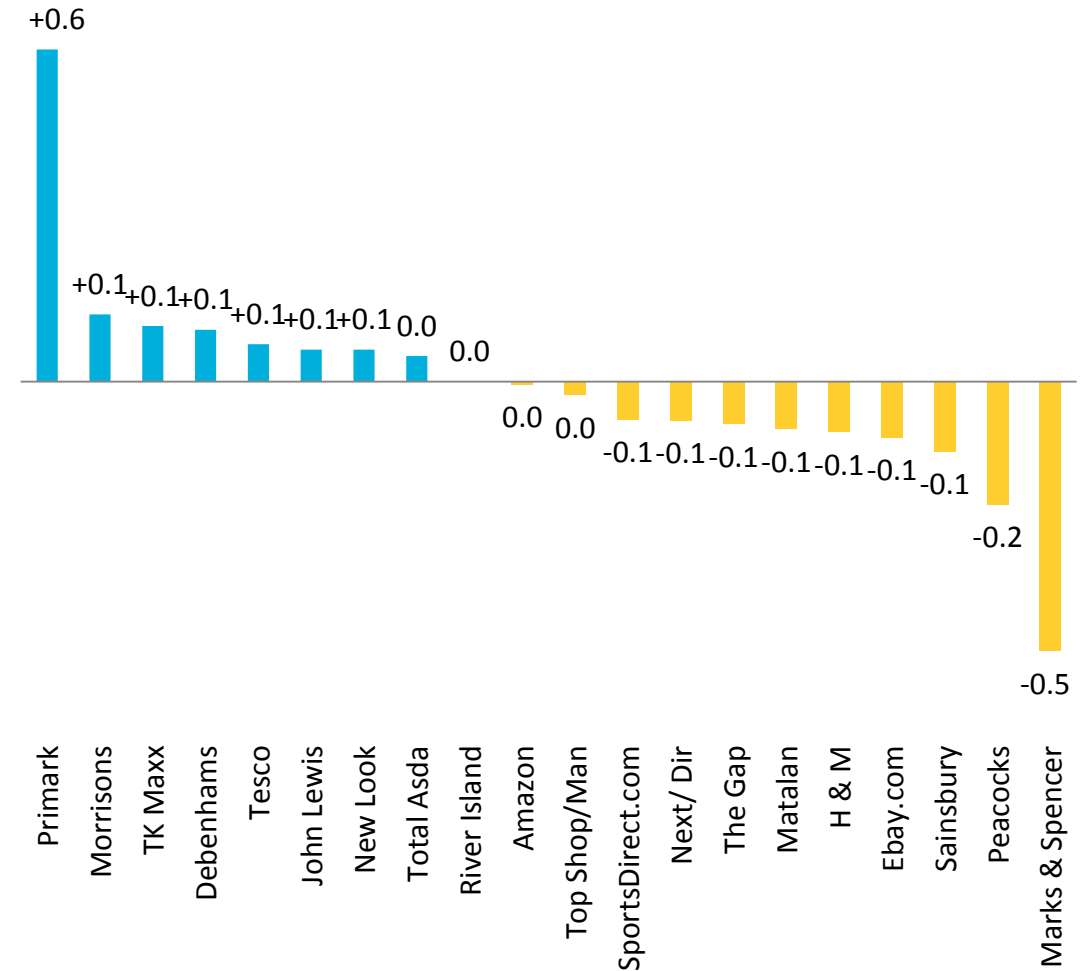
Extensions	Sqft k
London - Peckham	+9
Merry Hill	+26
Norwich	+32

400k sqft of space refurbished in 18/19

# Market & Competitors – Kantar: Total Clothing, Footwear & Accessories

## 24 Weeks

EXPENDITURE %					VOLUME %				
Rank	Retailer	Feb-18	Feb-19	Var	Rank	Retailer	Feb-18	Feb-19	Var
1	Marks & Spencer	9.6	9.2	-0.3	1	<b>Primark</b>	<b>16.4</b>	<b>17.0</b>	<b>+0.6</b>
2	Next/ Dir	7.2	7.2	0.0	2	Marks & Spencer	11.0	10.5	-0.5
3	<b>Primark</b>	<b>5.9</b>	<b>6.2</b>	<b>+0.2</b>	3	Total Asda	9.8	9.8	0.0
4	Debenhams	4.8	4.9	+0.1	4	Next/ Dir	6.2	6.1	-0.1
5	Total Asda	4.3	4.2	-0.1	5	Tesco	5.6	5.6	+0.1
6	New Look	3.1	3.1	0.0	6	Sainsbury	4.5	4.4	-0.1
7	Tesco	2.8	2.9	0.0	7	Matalan	3.6	3.5	-0.1
8	SportsDirect.com	2.8	2.7	-0.1	8	Debenhams	2.9	3.0	+0.1
9	Matalan	2.3	2.4	+0.1	9	New Look	2.7	2.8	+0.1
10	Sainsbury	2.3	2.3	0.0	10	SportsDirect.com	2.7	2.6	-0.1
11	TK Maxx	2.0	2.1	+0.1	11	TK Maxx	1.8	1.9	+0.1
12	JD/First Sport	1.8	2.0	+0.1	12	H & M	1.9	1.8	-0.1
13	John Lewis	1.8	1.9	+0.1	13	Peacocks	1.5	1.3	-0.2
14	River Island	1.8	1.8	0.0	14	Amazon	1.1	1.1	0.0
15	H & M	1.7	1.6	0.0	15	Ebay.com	1.1	1.0	-0.1
16	Top Shop/Man	1.6	1.5	-0.2	16	Morrisons	0.8	0.9	+0.1
17	ASOS.com	1.3	1.3	+0.1	17	River Island	0.9	0.9	0.0
18	Amazon	1.3	1.3	0.0	18	Top Shop/Man	0.8	0.8	0.0
19	Total Clarks/K Shoes	1.3	1.3	0.0	19	John Lewis	0.7	0.8	+0.1
20	Ebay.com	1.1	1.0	-0.1	20	The Gap	0.8	0.7	-0.1



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**Thank you**