



OVERGATE
DUNDEE

Overgate



Scotland's fourth largest city

420,000 SQ FT
of retail space

60+
shops & stores

1,000
parking spaces

Overgate

The centre is firmly positioned as the prime retail location in Dundee, offering a high quality, modern environment with an excellent retail mix.

The centre houses more than 60 retail stores and cafés in a unique environment which uses natural materials including limestone, glass and wood offering shoppers an 'outdoor-indoors' experience not found anywhere else.

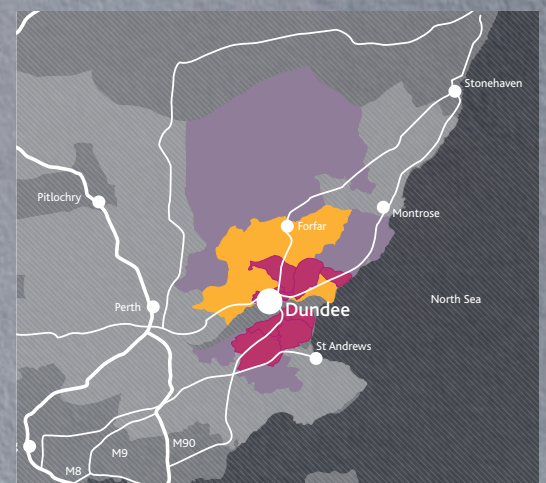
Overgate has a growing reputation for delivering high fashion and stylish mass-market retail with a diverse range of supporting outlets. The impressive retail line up includes anchor stores such as Next, H&M, New Look, Debenhams and Primark, with additional retailers such as TopShop, River Island, La Senza, Superdry and Stormfront (premium Apple reseller).

Three balcony cafés and eating establishments including Starbucks contribute to make Overgate a superb shopping experience.

Dundee

Dundee is home to a large student population with one in seven people being a student. The City is benefitting from the intellectual capital generated by its two Universities, and is building a reputation for science and technology. It is now home to two major science and investment companies and is at the forefront of Scotland's renewable energy development.

A growing reputation for art, music and culture, exemplified by the Victoria and Albert museum, which is due to open in 2014 will further enhance Dundee's stature as a key visitor destination.



- Primary Catchment
- Secondary Catchment
- Tertiary Catchment
- Quaternary Catchment

Key facts

SIZE: **420,000 sq ft** (39,018 sq m)

NUMBER OF UNITS: **60+**

FOOTFALL: **13.9 million⁽¹⁾**

ANCHOR AND MAJOR UNITS: **Debenhams, H&M, Primark, New Look, Next, Boots and Topshop/Topman**

RESIDENTIAL CATCHMENT POPULATION: **575,020⁽²⁾**

MARKET POTENTIAL: **£450.7 million⁽²⁾**

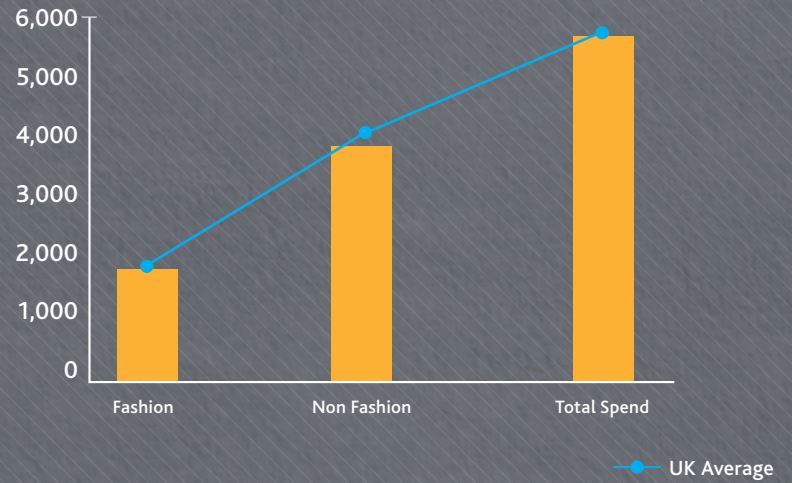
CACI RANKING: **64⁽³⁾**

CAR PARKS: **2** (providing over 1,000 spaces)

Retail ranking

CACI Ranking ⁽³⁾	Centre Area	Comparison Goods Spend £m ⁽²⁾	Residential Catchment Population ⁽²⁾
61	Bradford	£463.9	2,187,191
62	Middlesborough	£475.9	1,329,956
63	Stoke-on-trent (Hanley)	£427.5	977,032
64	Dundee	£450.7	575,020
65	Northampton	£399.9	1,276,939
66	City of London (Broadgate)	£404.6	6,088,042
67	Lincoln	£370.2	542,385
68	Blackpool	£362.6	609,349
69	Grimsby	£382.6	376,894
70	Harrogate	£372.4	1,493,646

Annual household spend (£)⁽⁴⁾



ACORN profile⁽⁴⁾

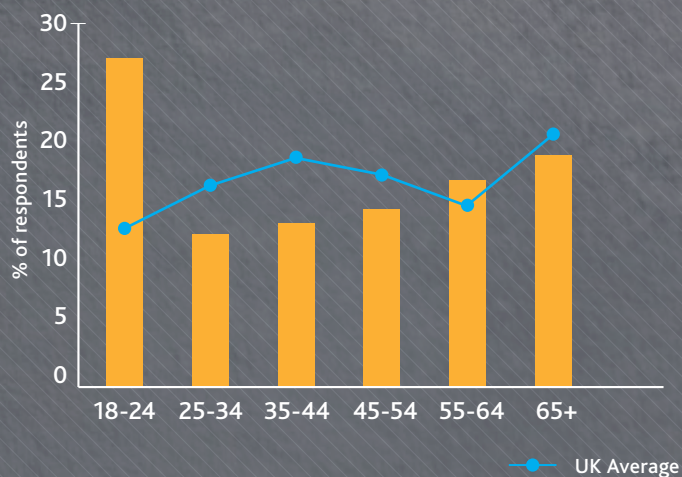
Overgate attracts levels of Educated Urbanites and Aspiring Singles that are significantly higher than the City, Regional and National averages



Source: 1. Annual Footfall Report 2011 2. CACI PCG Rankings Report 2011 3. CACI RF Retail Ranking 2011 4. CACI Centre Report 2011

Overgate has a residential catchment population of over 575,000 with a market potential of £451 million⁽²⁾

Overgate age profile⁽⁴⁾



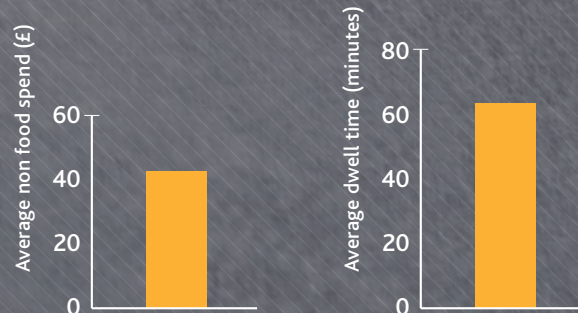
Average retail spend⁽⁴⁾ (spenders only)

Average retail spend⁽⁴⁾ (spenders only)

Average dwell time⁽⁴⁾

Average dwell time⁽⁴⁾

Overgate shoppers spend an average of 63 minutes and £43 per visit. 70% of shoppers visit at least once a week



Annual weighted spend by category⁽⁴⁾

Category	Annual Weighted Expenditure (£m)
Clothing	£119.7
Footwear	£18.8
House & Home	£16.4
Leisure Goods	£81.6
Personal Goods	£25.1
Personal Care	£48.5
Durable Goods	£140.7
Comparison Goods	£450.7
Convenience	£347.1
Catering	£105.6
Total Retail Spend	£903.4

Annual household spend by category⁽⁴⁾

Category	Annual Household Spend (£)
Clothing	£1,474
Footwear	£232
House & Home	£202
Leisure Goods	£1,005
Personal Goods	£309
Personal Care	£597
Durable Goods	£1,733
Comparison Goods	£5,552
Convenience	£4,275
Catering	£1,301
Total Retail Spend	£11,127

A world of retail opportunities

Overgate offers a vibrant mix of retailers that has established the centre as the city's principal shopping destination.

Superdry.

next

DEBENHAMS

RIVER ISLAND

PRIMARK

TOPSHOP

H&M

www.overgate.co.uk



Mall retailing and brand partnerships

The scale of our portfolio is matched with an equally comprehensive range of ways we can help you to grow your business.

Our Mall Retailing strategy is co-ordinated and complementary to the in-line retail mix, providing both fledgling brands and large multiples the chance to retail in the heart

of the centre, with all the associated benefits of a turn-key solution whilst Pop-up retail stores offer a flexible retail space to enable brands to showcase new ideas and concepts.

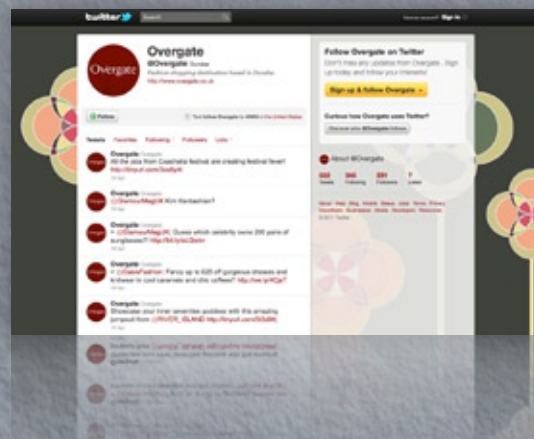
Our Brand Partnerships strategy offers you truly multi-channel solutions; from brand experience to advertising opportunities to

total brand immersion, we create platforms where you can interact with millions of highly engaged customers throughout the retail journey, online, at home, in centre and immediately before the moment of purchase.

Centre marketing campaigns

Overgate benefits from a comprehensive marketing campaign to consistently drive footfall to the centre. A combination of targeted fashion and lifestyle communications, digital and PR campaigns are supplemented by in-centre events – all of

which provide shoppers with inspiration to shop, sustaining a high frequency of visit and spend.



Overgate, Dundee



One New Change, City of London



The Centre, Livingston



St David's Dewi Sant, Cardiff



Shaping the future of retail

Land Securities has established a reputation as one of the most active and forward thinking property companies in the country.

With a commercial property portfolio of approximately 29 million sq ft, we are a FTSE 100 company and the largest Real Estate Investment Trust in the UK, providing property services to more than 2,500 private and public sector clients. We remain market leader by harnessing our expertise and insight to continually create new retail opportunities, fulfilling our commitment to help retailers grow their business.

We are committed to shaping the future of retail and that's why 300 million shoppers a year visit our retail destinations. From shopping centres and retail parks to outlet centres, we pride ourselves on being the best at what we do – continually exceeding expectations.

Our portfolio spans 22 shopping centres, 18 retail parks and 3 outlets, within which we care for approximately 1,600 retailers. We also have two of the most exciting developments in the UK, Trinity Leeds and 185-221 Buchanan Street, both set to launch in Spring 2013.

20.6M SQ FT
of retail accommodation

1,600
retail occupiers

22
shopping centres

18
retail parks

3
outlets

Clearlet: a new benchmark for the industry

Designed to update and clarify the leasing process, reduce costs and speed up deals, Land Securities' launched Clearlet in 2009. Since then, we introduced Clearlet 2, which streamlined the process even further. It is still evolving, and is likely to continue to do so due to our determination to give our retail customers a service which gets better and better all the time.

This groundbreaking easy-to-follow modern lease, written in plain English, and just 20 pages long, is yet another example of how we work in active partnership with our tenants. It is truly customer focused, arising from extensive dialogue as they voluntarily engaged with us in shaping the lease.

So what does Clearlet do? It provides for:

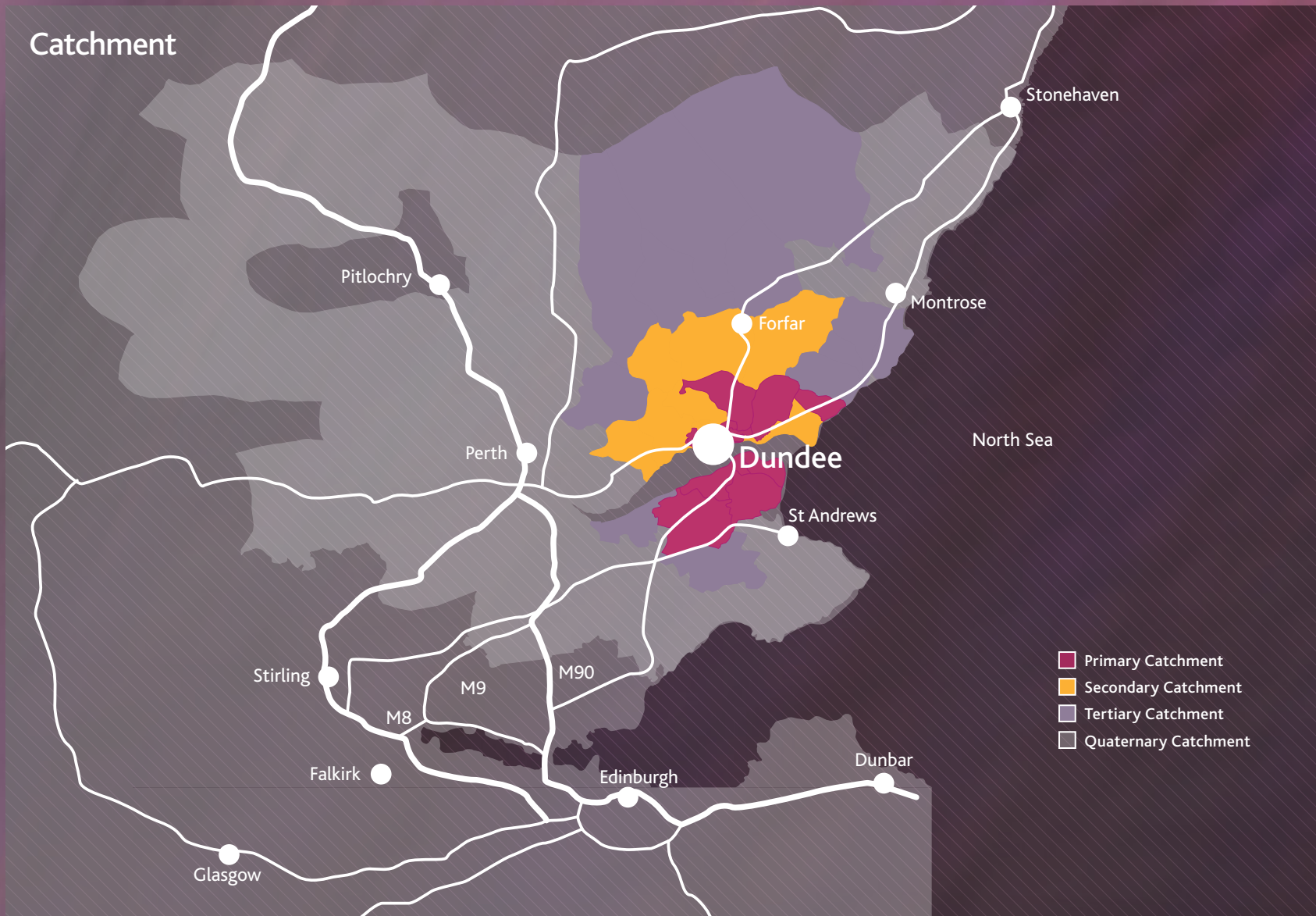
- **Monthly rents as standard – in exchange for retailer turnover data**
- **Flexible rent review options – either to open market or linked to RPI**
- **Deemed consent for alterations, assignment and under letting – if we fail to respond within fixed timescales to retailers' applications for these**
- **Inclusive Service Charge terms**
- **A partnership approach on sustainability and sharing of energy performance data**

Most importantly, it is continuously reviewed and incorporates as standard the majority of common retailer amendments to our standard form lease and is Lease Code and Service Charge Code compliant.

“OUR RETAIL PORTFOLIO PROVIDES RETAILERS WITH THE ENVIRONMENTS THEY NEED”



Catchment



- Primary Catchment
- Secondary Catchment
- Tertiary Catchment
- Quaternary Catchment

Trade Area	Resident Catchment Population	Comparison Goods Spend (£m)
Primary	133,639	229.8
Secondary	78,182	112.9
Tertiary	60,661	65.2
Quaternary	302,538	42.8
Total Catchment	575,020	450.7

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For further information, please contact



Stuart Moncur
 T: 0131 226 8754
 E: stuart.moncur@eur.cushwake.com

Ross Wilkie
 T: 0141 223 8762
 E: ross.wilkie@eur.cushwake.com

Naomi Howard
 T: 020 7024 5077
 E: naomi.howard@landsecurities.com

Jonathan Buckle
 T: 0113 261 5363
 E: jonathan.buckle@landsecurities.com

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DUNDEE

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BOOKS & MUSIC

	UNIT	SQ FT
WH Smith	L18, U18, S18	7,958

CAFES & RESTAURANTS

Baguette Express	U Café Bar 3	1,110
Burger King	U19	2,110
Costa Coffee	Café	2,360
Fuel	KU4b	227
Greggs	L30	1,097
Millie's Cookies	U Café Bar 2	1,246
Muffin Break	U Café Bar 1	1,457
Spud-u-like	U20	2,394
Starbucks	U35	1,477
Subway	U21	1,120

CARDS GIFTS & STATIONERY

art@home	U31	1,208
Clinton Cards	L23	2,684
Ortak	U5	1,516
Paperchase	L9	1,917

CHEMIST, HEALTH & BEAUTY

Bodycare	L19	2,545
Boots	U27	6,094
Fragrance House	KL1 Kiosk / L27	642
Lush	U6	1,798
Optical Express	U15	1,549
Regis	U28	1,159
Superdrug	L24	7,123
The Perfume Shop	L34	800
Vision Express	U7	2,334

DEPARTMENT STORES

Debenhams	AMSU 104,382
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FASHION

	UNIT	SQ FT
Artful Custom	U4(a)	199
Bank	L3	3,285
Country Casuals Viyella	U8	1,649
First Sport	L17	2,834
French Connection	L6	2,075
Gap	L1-L2 & U2	14,573
H&M	MSU 2 L	17,731
Jane Norman	L10	1,900
La Senza	L11	1,747
New Look	MSU 3	32,335
Next	MSU 1 A	14,817
Oasis	L5	2,947
Primark	40 High Street 12 & 14 Overgate	62,870
River Island	L4/ U3	6,761
Simply Bridal	L28	643
Superdry	U9-U11	4,694
Topman	MSU5	13,422
Topshop	MSU5	13,422
USC	U1	6,342

FOOTWEAR

Barratts	L15	1,786
Crocs@wardwalkers	U7a	325
Garage Shoes	U29	918
Office	L7	2,707

JEWELLERY

Claire's Accessories	L7a	904
Ernest Jones	L21	1,178
Goldsmiths	L35	1,491
Swarovski	L33	1,236
Warren James	L31	1,279

SPECIALITY SHOPS

Argos	MSU 2U	12,436
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SPORTSWEAR

First Sport	L17	2,834
Sports Direct	MSU 1 B	15,927

TECHNOLOGY

Carphone Warehouse	L8	1,898
O2	L32	1,324
Orange	L22	1,295
Phones 4 U Extra	L20	1,749
Stormfront	U17	1,744
T Mobile	U34	773
Virgin Media	L16	1,996
3 Store	L29	1,256

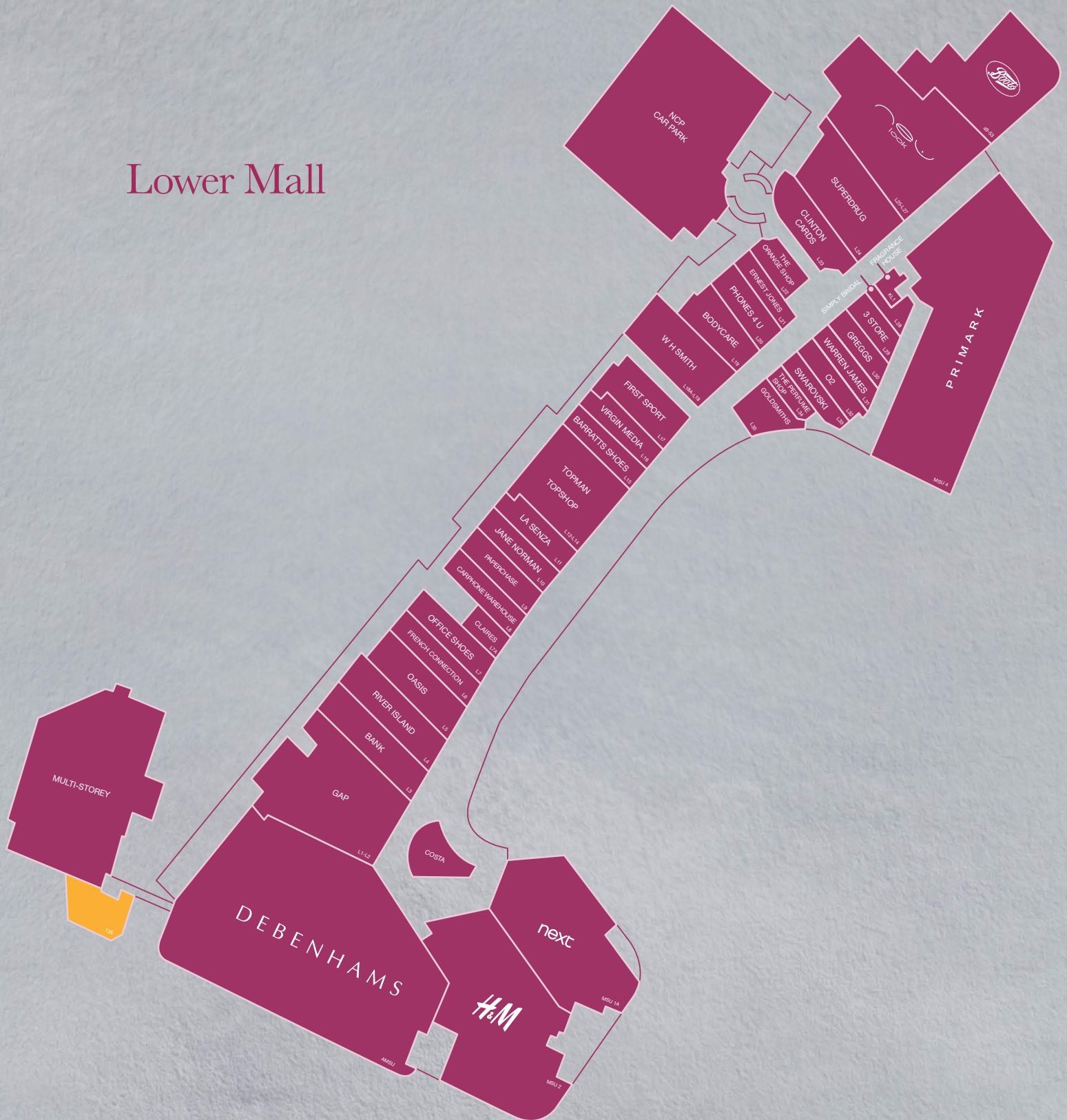
TRAVEL AGENTS

Thomson	U16	1,583
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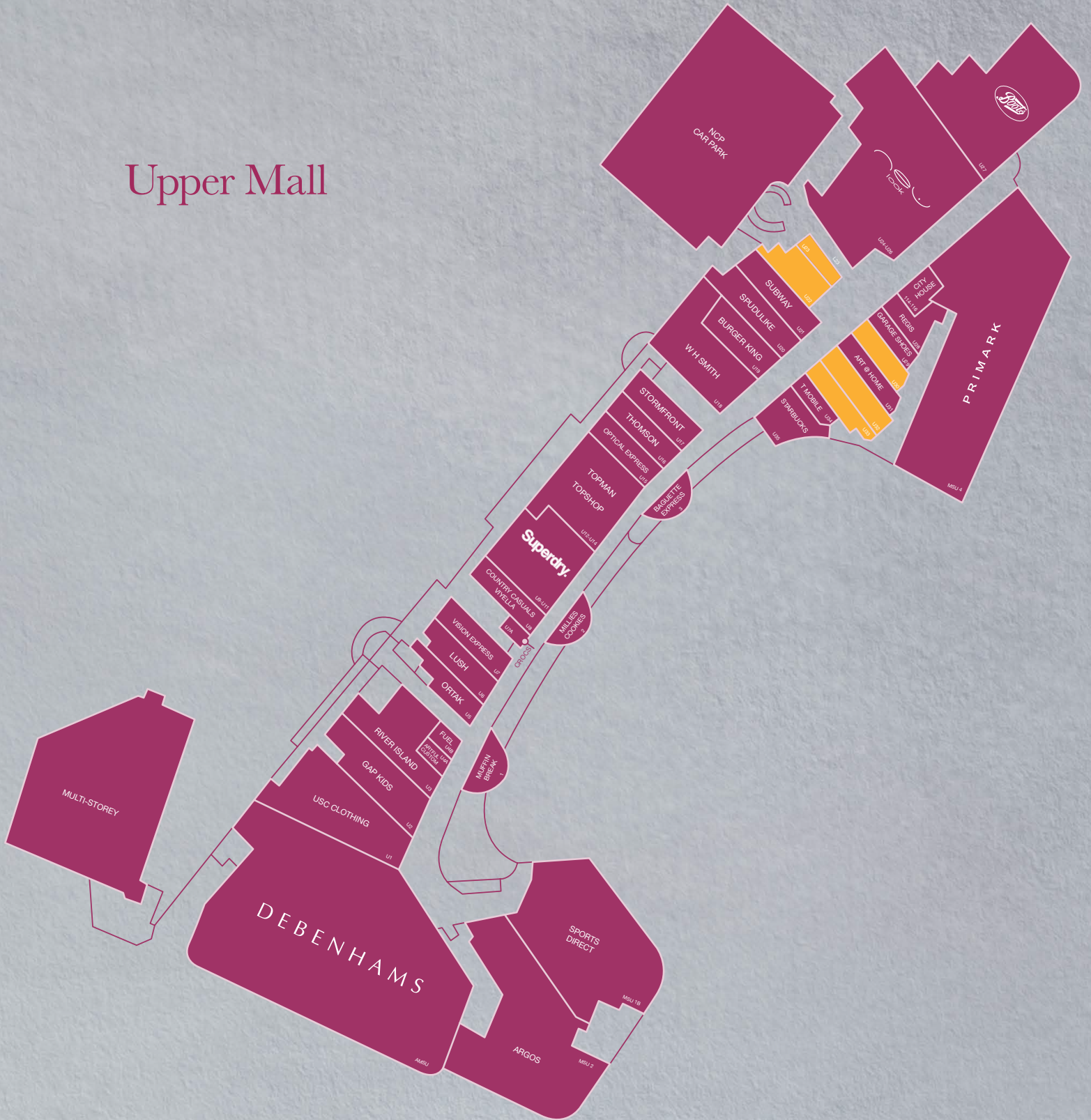
AVAILABLE

Upper Mall	U22	1,327
Upper Mall	U23	551
Upper Mall	U32	1,327
Upper Mall	U30	1,501
Upper Mall	U33	1,252
Lower Mall	135	3,500

Lower Mall



Upper Mall





1000+
car park spaces

5 minutes
walk from Dundee train station

2 minutes
walk from Dundee University

Short taxi ride
from Dundee airport

Public transport
major bus interchange

Taxi rank
just outside the centre

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