

| Per Pub Analysis | 10 Minute WT Catchment | 20 Minute WT Catchment | 20 Minute DT Catchment |
|------------------|------------------------|------------------------|------------------------|
|------------------|------------------------|------------------------|------------------------|

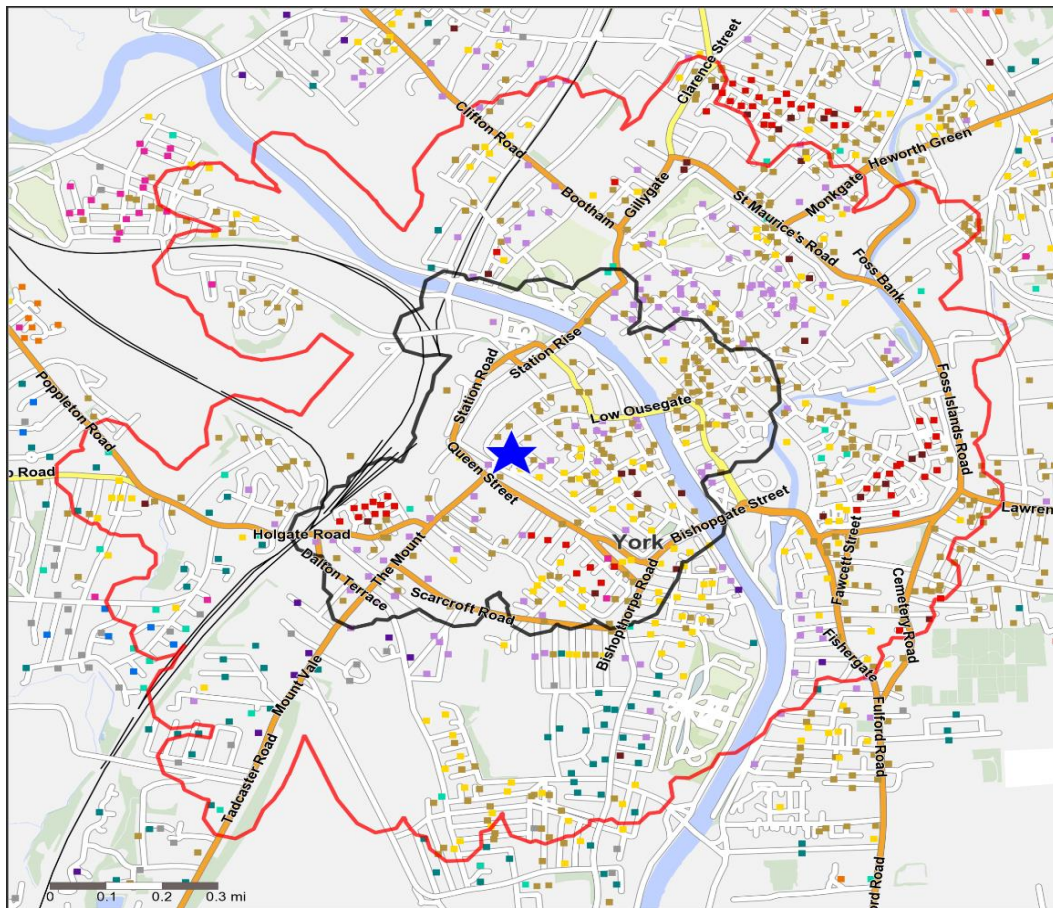
| | | | |
|--|-------|--------|---------|
| Number of Pubs | 66 | 146 | 248 |
| Catchment Adults 18+ | 5,557 | 23,387 | 183,089 |
| Catchment Adults 18+ Per Pub | 84 | 160 | 738 |
| Populaton Projection 2018 to 2028 (% change) | 7.12% | 6.82% | 6.46% |

| | | 10 Minute Walktime | | | | | 20 Minute Walktime | | | | | 20 Minute Drivetime | | |
|------|----------------------|--------------------|-----------------|-------|------|----------------------|--------------------|-----------------|-------|------|----------------------|---------------------|-----------------|-------|
| Rank | Type | Target Customers | % of Population | Index | Rank | Type | Target Customers | % of Population | Index | Rank | Type | Target Customers | % of Population | Index |
| 1 | High Street Pub | 4,374 | 78.7 | 152 | 1 | High Street Pub | 17,560 | 75.1 | 145 | 1 | High Street Pub | 125,586 | 68.6 | 132 |
| 2 | Bit of Style | 3,330 | 59.9 | 129 | 2 | Bit of Style | 14,320 | 61.2 | 131 | 2 | Premium Local | 96,132 | 52.5 | 113 |
| 3 | Community Pub | 2,985 | 53.7 | 85 | 3 | Community Pub | 10,586 | 45.3 | 72 | 3 | Community Pub | 79,833 | 43.6 | 69 |
| 4 | Craft Led | 2,475 | 44.5 | 344 | 4 | Craft Led | 9,139 | 39.1 | 302 | 4 | Great Pub Great Food | 73,486 | 40.1 | 310 |
| 5 | Circuit Bar | 1,847 | 33.2 | 82 | 5 | Great Pub Great Food | 8,364 | 35.8 | 89 | 5 | Bit of Style | 60,954 | 33.3 | 83 |
| 6 | Great Pub Great Food | 1,801 | 32.4 | 121 | 6 | Circuit Bar | 7,307 | 31.2 | 116 | 6 | Circuit Bar | 36,800 | 20.1 | 75 |
| 7 | Premium Local | 1,002 | 18.0 | 175 | 7 | Premium Local | 7,145 | 30.6 | 297 | 7 | Craft Led | 35,681 | 19.5 | 189 |

| | 10 Minute WT Catchment | | | 20 Minute WT Catchment | | | 20 Minute DT Catchment | | |
|--------------|------------------------|-----------------|-------|------------------------|-----------------|-------|------------------------|-----------------|-------|
| Social Grade | Target Customers | % of Population | Index | Target Customers | % of Population | Index | Target Customers | % of Population | Index |
| AB | 1,057 | 19.0 | 215 | 3,657 | 15.6 | 177 | 18,611 | 10.2 | 115 |
| C1 | 939 | 16.9 | 138 | 3,602 | 15.4 | 126 | 22,147 | 12.1 | 99 |
| C2 | 292 | 5.3 | 64 | 1,285 | 5.5 | 67 | 12,679 | 6.9 | 84 |
| DE | 564 | 10.1 | 99 | 1,925 | 8.2 | 80 | 14,841 | 8.1 | 79 |

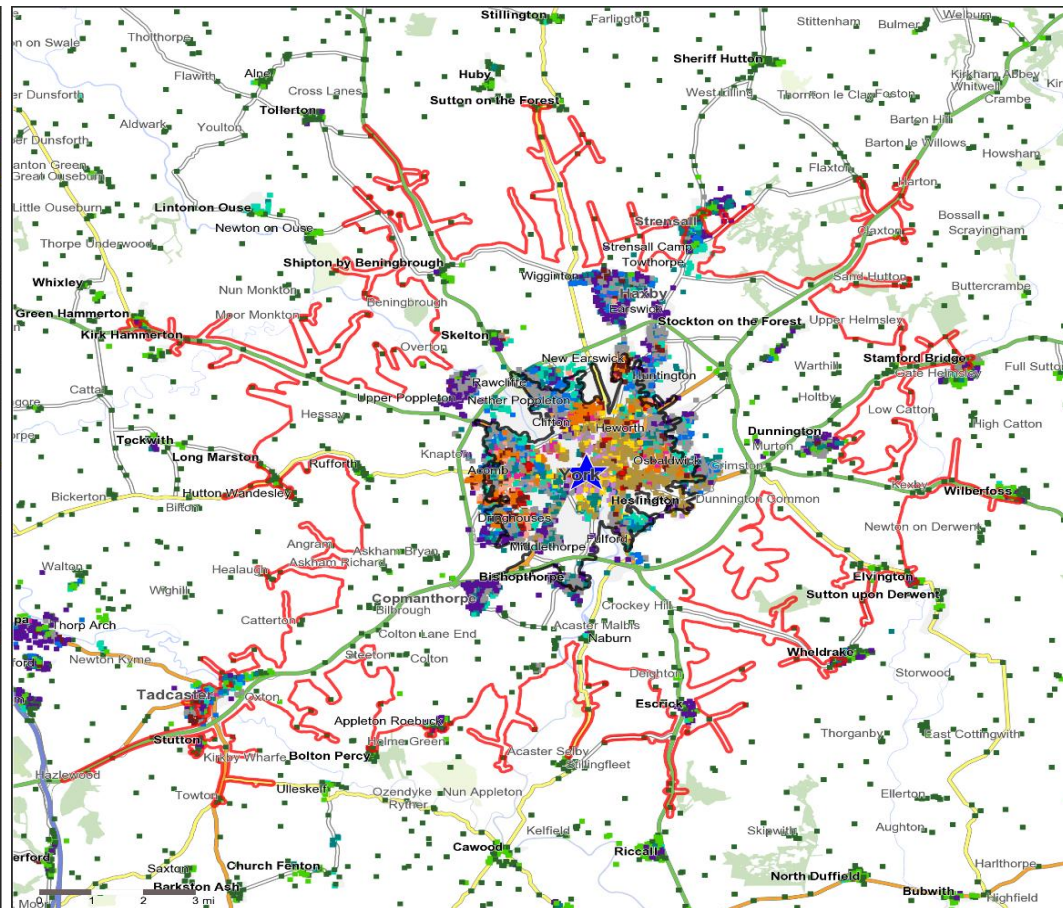
| | 10 Minute WT Catchment | | | 20 Minute WT Catchment | | | 20 Minute DT Catchment | | |
|-------------------|------------------------|-----------------|-------|------------------------|-----------------|-------|------------------------|-----------------|-------|
| Affluence (Bands) | Target Customers | % of Population | Index | Target Customers | % of Population | Index | Target Customers | % of Population | Index |
| Low (0-6) | 1,558 | 28.0 | 85 | 6,470 | 27.7 | 83 | 47,530 | 26.0 | 78 |
| Medium (7-13) | 2,189 | 39.4 | 119 | 8,867 | 37.9 | 114 | 70,421 | 38.5 | 116 |
| High (14-19) | 886 | 15.9 | 56 | 3,842 | 16.4 | 58 | 45,931 | 25.1 | 88 |

Mosaic Groups in 10 and 20 Minute WT Catchment Areas



Copyright Experian Ltd, HERE 2017. Ordnance Survey © Crown copyright 2017

Mosaic Groups in 10 and 20 Minute DT Catchment Area



Copyright Experian Ltd, HERE 2017. Ordnance Survey © Crown copyright 2017



Adults 18+ by Mosaic Type in Each Catchment

| | | | | 10 Minute WT | 20 Minute WT | 10 Minute DT | 20 Minute DT |
|---------------------|-----------------------|--|--|-------------------------|-------------------------|-------------------------|-------------------------|
| Mosaic Type Profile | | | | Catchment Adults 18+ | Catchment Adults 18+ | Catchment Adults 18+ | Catchment Adults 18+ |
| A01 | World-Class Wealth | | | 20 | 64 | 64 | 64 |
| A02 | Uptown Elite | | | 578 | 2,292 | 3,425 | 3,444 |
| A03 | Penthouse Chic | | | 0 | 0 | 0 | 0 |
| A04 | Metro High-Flyers | | | 362 | 720 | 720 | 720 |
| B05 | Premium Fortunes | | | 0 | 45 | 283 | 383 |
| B06 | Diamond Days | | | 18 | 136 | 706 | 1,545 |
| B07 | Alpha Families | | | 0 | 0 | 302 | 2,718 |
| B08 | Bank of Mum and Dad | | | 0 | 6 | 270 | 2,811 |
| B09 | Empty-Nest Adventure | | | 0 | 6 | 766 | 7,850 |
| C10 | Wealthy Landowners | | | 0 | 0 | 10 | 3,945 |
| C11 | Rural Vogue | | | 0 | 0 | 5 | 1,351 |
| C12 | Scattered Homesteads | | | 0 | 0 | 0 | 483 |
| C13 | Village Retirement | | | 0 | 0 | 2 | 3,353 |
| D14 | Satellite Settlers | | | 0 | 0 | 1 | 2,931 |
| D15 | Local Focus | | | 0 | 0 | 0 | 522 |
| D16 | Outlying Seniors | | | 0 | 0 | 0 | 737 |
| D17 | Far-Flung Outposts | | | 0 | 0 | 0 | 0 |
| E18 | Legacy Elders | | | 44 | 235 | 4,943 | 8,249 |
| E19 | Bungalow Heaven | | | 0 | 0 | 2,966 | 10,076 |
| E20 | Classic Grandparents | | | 0 | 55 | 4,193 | 6,120 |
| E21 | Solo Retirees | | | 0 | 73 | 3,136 | 3,965 |
| F22 | Boomerang Boarders | | | 0 | 7 | 2,401 | 6,205 |
| F23 | Family Ties | | | 0 | 25 | 1,812 | 2,940 |
| F24 | Fledgling Free | | | 0 | 0 | 227 | 601 |
| F25 | Dependable Me | | | 0 | 4 | 1,416 | 3,303 |
| G26 | Cafés and Catchments | | | 0 | 719 | 2,515 | 2,756 |
| G27 | Thriving Independence | | | 0 | 1,052 | 5,398 | 6,788 |
| G28 | Modern Parents | | | 0 | 0 | 63 | 1,500 |
| G29 | Mid-Career Convention | | | 0 | 0 | 550 | 4,441 |
| H30 | Primary Ambitions | | | 0 | 230 | 2,726 | 4,708 |
| H31 | Affordable Fringe | | | 0 | 0 | 720 | 1,299 |
| H32 | First-Rung Futures | | | 0 | 52 | 1,802 | 3,274 |
| H33 | Contemporary Starts | | | 0 | 0 | 715 | 1,923 |
| H34 | New Foundations | | | 94 | 658 | 1,524 | 1,569 |
| H35 | Flying Solo | | | 0 | 26 | 929 | 1,751 |

| | | | | 10 Minute WT | 20 Minute WT | 10 Minute DT | 20 Minute DT |
|---------------------|------------------------|--|--|-------------------------|-------------------------|-------------------------|-------------------------|
| Mosaic Type Profile | | | | Catchment Adults 18+ | Catchment Adults 18+ | Catchment Adults 18+ | Catchment Adults 18+ |
| I36 | Solid Economy | | | 0 | 0 | 6,352 | 7,457 |
| I37 | Budget Generations | | | 0 | 0 | 461 | 744 |
| I38 | Economical Families | | | 0 | 0 | 218 | 530 |
| I39 | Families on a Budget | | | 0 | 0 | 2,091 | 2,608 |
| J40 | Value Rentals | | | 0 | 0 | 121 | 134 |
| J41 | Youthful Endeavours | | | 7 | 7 | 725 | 797 |
| J42 | Midlife Renters | | | 0 | 137 | 2,778 | 3,099 |
| J43 | Renting Rooms | | | 41 | 41 | 617 | 617 |
| K44 | Inner City Stalwarts | | | 387 | 599 | 734 | 734 |
| K45 | City Diversity | | | 0 | 0 | 0 | 0 |
| K46 | High Rise Residents | | | 0 | 0 | 0 | 0 |
| K47 | Single Essentials | | | 199 | 555 | 2,520 | 2,775 |
| K48 | Mature Workers | | | 0 | 0 | 57 | 57 |
| L49 | Flatlet Seniors | | | 52 | 176 | 940 | 949 |
| L50 | Pocket Pensions | | | 0 | 0 | 919 | 1,639 |
| L51 | Retirement Communities | | | 92 | 367 | 1,788 | 2,488 |
| L52 | Estate Veterans | | | 36 | 36 | 2,332 | 2,869 |
| L53 | Seasoned Survivors | | | 0 | 0 | 135 | 160 |
| M54 | Down-to-Earth Owners | | | 0 | 0 | 93 | 152 |
| M55 | Back with the Folks | | | 0 | 0 | 2,374 | 2,937 |
| M56 | Self Supporters | | | 0 | 0 | 530 | 615 |
| N57 | Community Elders | | | 0 | 0 | 61 | 61 |
| N58 | Culture & Comfort | | | 0 | 0 | 2 | 2 |
| N59 | Large Family Living | | | 0 | 0 | 0 | 0 |
| N60 | Ageing Access | | | 1,275 | 4,539 | 8,211 | 8,321 |
| O61 | Career Builders | | | 778 | 2,851 | 5,194 | 5,340 |
| O62 | Central Pulse | | | 1,405 | 4,058 | 5,878 | 5,890 |
| O63 | Flexible Workforce | | | 32 | 33 | 77 | 84 |
| O64 | Bus-Route Renters | | | 49 | 354 | 1,942 | 2,169 |
| O65 | Learners & Earners | | | 37 | 1,085 | 12,561 | 13,629 |
| O66 | Student Scene | | | 25 | 479 | 2,911 | 2,939 |
| U99 | Unclassified | | | 27 | 1,665 | 5,126 | 8,949 |
| Total | | | | 5,558 | 23,387 | 112,338 | 183,070 |

Top 3 Mosaic Types in a 20 Minute Walktime

1. N60 Ageing Access

Older residents owning small inner suburban properties with good access to amenities



- Average age 63
- Often living alone
- Most are homeowners
- Modest income
- 1 or 2 bed flats and terraces
- Pleasant inner suburbs

2. O62 Central Pulse

City-loving youngsters renting central flats in vibrant locations close to jobs and night life



- Aged under 35
- City centre regeneration
- Rent small new build and converted flats
- Graduate starter salaries
- Most frequent cinema goers
- Love modern technology

3. O61 Career Builders

Professional singles and couples in their 20s and 30s progressing in their field of work from commutable properties



- Most aged 26-35
- Singles and cohabiting couples
- Good incomes from career jobs
- Rent /own nice apartments
- Pleasant neighbourhoods
- High use of email

Top 3 Mosaic Types in a 20 Minute Drivetime

1. O65 Learners & Earners

Inhabitants of the university fringe where students and older residents mix in cosmopolitan locations



- Students among local residents
- Close proximity to universities
- Cosmopolitan atmosphere
- Often terraces
- Two-thirds rent privately
- Watch videos online

2. E19 Bungalow Haven

Peace-seeking seniors appreciating the calm of bungalow estates designed for the older owners



- Elderly couples and singles
- Own their bungalow outright
- Neighbourhoods of elderly people
- May research online
- Like buying in store
- Pre-pay mobiles, low spend

3. N60 Ageing Access

Older residents owning small inner suburban properties with good access to amenities



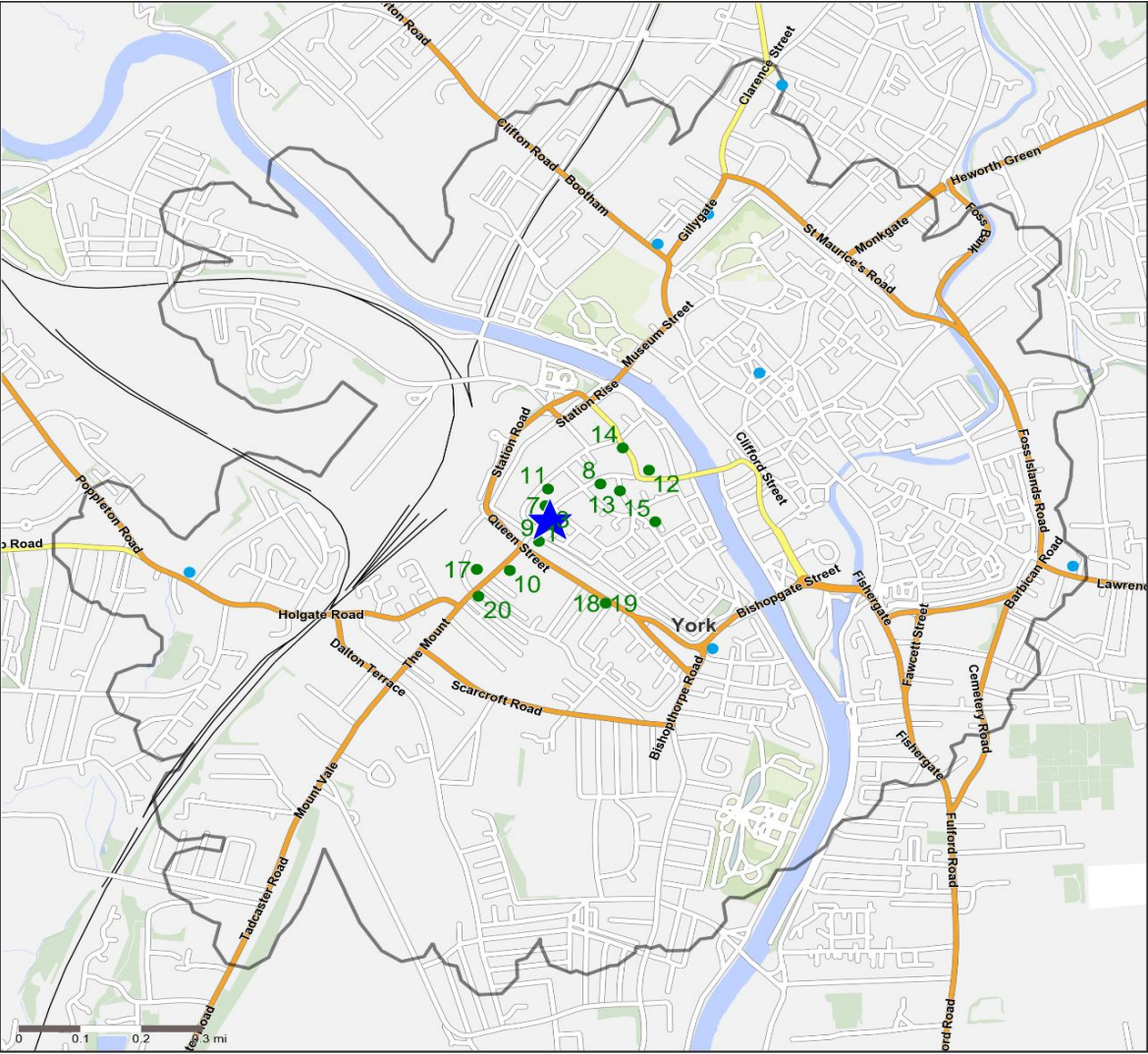
- Average age 63
- Often living alone
- Most are homeowners
- Modest income
- 1 or 2 bed flats and terraces
- Pleasant inner suburbs

Full visualisation of all types and groups are available in Segmentation Portal: www.segmentationportal.com. If you do not have log in details for Segmentation Portal then please contact the Experian Helpdesk: EMSUKHelpdesk@experian.com | 0115 968 5099

| Activity Group Structure | 20 Minute Walktime | | | | | | | | | |
|-------------------------------|--------------------|-----------------|-------|------------------|-----------------|-------|------------------|-----------------|-------|------------------|
| | High | | | Medium | | | Low | | | |
| | Target Customers | % of Population | Index | Target Customers | % of Population | Index | Target Customers | % of Population | Index | Target Customers |
| Female: Alone, Pair or Group | 14,521 | 62.1 | 205 | 3,612 | 15.4 | 94 | 3,589 | 15.3 | 29 | |
| Male: Alone | 8,150 | 34.8 | 117 | 7,229 | 30.9 | 198 | 6,343 | 27.1 | 51 | |
| Male: Group | 12,974 | 55.5 | 243 | 2,451 | 10.5 | 40 | 6,298 | 26.9 | 54 | |
| Male: Pair | 14,262 | 61.0 | 234 | 1,548 | 6.6 | 43 | 5,912 | 25.3 | 44 | |
| Mixed Sex: Group | 12,575 | 53.8 | 235 | 2,795 | 12.0 | 37 | 6,353 | 27.2 | 62 | |
| Mixed Sex: Pair | 6,206 | 26.5 | 113 | 9,727 | 41.6 | 128 | 5,790 | 24.8 | 58 | |
| With Children | 4,122 | 17.6 | 61 | 169 | 0.7 | 4 | 17,431 | 74.5 | 141 | |
| Unknown | 8,311 | 35.5 | 108 | 2,677 | 11.4 | 64 | 10,734 | 45.9 | 96 | |
| For Eating: | | | | | | | | | | |
| Upmarket | 15,133 | 64.7 | 211 | 5,340 | 22.8 | 110 | 1,250 | 5.3 | 11 | |
| Midmarket | 15,718 | 67.2 | 196 | 3,045 | 13.0 | 144 | 2,959 | 12.7 | 23 | |
| Downmarket | 2,239 | 9.6 | 43 | 10,108 | 43.2 | 124 | 9,375 | 40.1 | 96 | |
| For Drinking (monthly spend): | | | | | | | | | | |
| Nothing | 6,015 | 25.7 | 85 | 4,461 | 19.1 | 81 | 11,246 | 48.1 | 107 | |
| Low (less than £10) | 8,015 | 34.3 | 115 | 1,580 | 6.8 | 29 | 12,127 | 51.9 | 114 | |
| Medium (Between £10 and £40) | 13,924 | 59.5 | 195 | 3,901 | 16.7 | 94 | 3,898 | 16.7 | 33 | |
| High (Greater than £40) | 16,636 | 71.1 | 275 | 2,185 | 9.3 | 46 | 2,901 | 12.4 | 24 | |

| Activity Group Structure | 20 Minute Drivetime | | | | | | | | |
|-------------------------------|---------------------|-----------------|-------|------------------|-----------------|-------|------------------|-----------------|-------|
| | High | | | Medium | | | Low | | |
| | Target Customers | % of Population | Index | Target Customers | % of Population | Index | Target Customers | % of Population | Index |
| Female: Alone, Pair or Group | 67,672 | 37.0 | 122 | 22,349 | 12.2 | 75 | 84,101 | 45.9 | 88 |
| Male: Alone | 52,830 | 28.9 | 97 | 29,969 | 16.4 | 105 | 91,322 | 49.9 | 94 |
| Male: Group | 43,613 | 23.8 | 104 | 55,757 | 30.5 | 116 | 74,752 | 40.8 | 82 |
| Male: Pair | 61,471 | 33.6 | 129 | 14,814 | 8.1 | 53 | 97,837 | 53.4 | 93 |
| Mixed Sex: Group | 51,008 | 27.9 | 122 | 53,152 | 29.0 | 91 | 69,961 | 38.2 | 87 |
| Mixed Sex: Pair | 59,655 | 32.6 | 139 | 63,545 | 34.7 | 107 | 50,921 | 27.8 | 65 |
| With Children | 31,696 | 17.3 | 60 | 19,330 | 10.6 | 63 | 123,096 | 67.2 | 127 |
| Unknown | 39,991 | 21.8 | 66 | 29,515 | 16.1 | 90 | 104,616 | 57.1 | 119 |
| For Eating: | | | | | | | | | |
| Upmarket | 71,609 | 39.1 | 128 | 32,223 | 17.6 | 85 | 70,289 | 38.4 | 81 |
| Midmarket | 69,425 | 37.9 | 110 | 16,777 | 9.2 | 102 | 87,920 | 48.0 | 87 |
| Downmarket | 48,334 | 26.4 | 119 | 65,212 | 35.6 | 102 | 60,577 | 33.1 | 80 |
| For Drinking (monthly spend): | | | | | | | | | |
| Nothing | 49,594 | 27.1 | 90 | 55,381 | 30.2 | 128 | 69,147 | 37.8 | 84 |
| Low (less than £10) | 61,519 | 33.6 | 113 | 46,557 | 25.4 | 108 | 66,046 | 36.1 | 80 |
| Medium (Between £10 and £40) | 78,305 | 42.8 | 140 | 20,173 | 11.0 | 62 | 75,644 | 41.3 | 82 |
| High (Greater than £40) | 69,944 | 38.2 | 148 | 22,706 | 12.4 | 60 | 81,472 | 44.5 | 85 |

Competitor Map



Copyright Experian Ltd, HERE 2017. Ordnance Survey © Crown copyright 2017



Top 20 Nearest Competitors

| Order | Outlet Name | Operator | Walktime From Site (Minutes) | Drivetime from Site (Minutes) |
|-------|---------------------------------------|----------------------------|------------------------------|-------------------------------|
| 1 | Gibson's, YO 1 6LB | Star Pubs & Bars | 0.0 | 0.0 |
| 2 | Micklegate Tap, YO 1 6LB | Amber Taverns | 0.0 | 0.0 |
| 3 | Priory, YO 1 6LB | Independent Free | 0.0 | 0.0 |
| 4 | Brewdog, YO 1 6JX | BrewDog plc | 0.0 | 0.1 |
| 5 | Brigantes Bar And Brasserie, YO 1 6JX | Heron & Brearley | 0.0 | 0.1 |
| 6 | Falcon Tap, YO 1 6JX | Independent Free | 0.0 | 0.1 |
| 7 | Nags Head, YO 1 6JX | Ei Group | 0.0 | 0.1 |
| 8 | Artful Dodger, YO 1 6LJ | Independent Free | 1.2 | 0.6 |
| 9 | Punch Bowl, YO24 1AU | Wetherspoon | 1.5 | 0.5 |
| 10 | Bar Convent Bed & Breakfast, YO24 1AQ | Independent Free | 2.7 | 0.9 |
| 11 | York Brewery Tap Room, YO 1 6JT | Mitchells | 3.0 | 0.7 |
| 12 | Tiger 10, YO 1 6JG | Independent Free | 3.0 | 1.1 |
| 13 | Ackhorne, YO 1 6LN | Ei Group | 3.0 | 1.2 |
| 14 | Pop World, YO 1 6JL | Stonegate Pub Company | 4.2 | 1.2 |
| 15 | Golden Ball, YO 1 6EF | Ei Group | 4.8 | 2.5 |
| 16 | Longboat, YO24 1AJ | Whitbread | 5.1 | 1.1 |
| 17 | Windmill Inn, YO24 1AJ | Greene King | 5.1 | 1.1 |
| 18 | Trafalgar Bay Inn, YO23 1AB | *Other Small Retail Groups | 5.7 | 1.9 |
| 19 | Victoria Vaults, YO23 1AB | Independent Free | 5.7 | 1.9 |
| 20 | Bay Horse, YO24 1AZ | Ei Group | 9.4 | 2.1 |