

RETAIL DESTINATION

AUGUST 2019

FORMERLY SHOPPING CENTRE MAGAZINE

THE BUSINESS OF RETAIL

ACCURACY MATTERS WHEN IT COMES TO CUSTOMER ANALYSIS

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EDITOR'S LETTER

As Retail Destination went to press news was coming in of a serious fire at The Mall in Walthamstow, North London. We should be thankful that nobody was hurt, but initial reports show a large proportion of the centre's roof space destroyed with collateral damage to the units below. Clearly the recovery operation is going to take some time before the busy community centre is full up and trading again.

It's too early to ascribe a cause to the fire, but it's worth noting that the growing desire to inject more catering uses into existing shopping centres brings with it an increased fire risk. Not only do cooking operations themselves ramp up the risk, but extract ducts themselves can be fire hazards if grease is allowed to build up. And installing ducting in existing structures risks compromising the original fire partitioning. Purely by coincidence we have an article on this very subject in our F&B feature.

Capital & Regional's fire plans look to have worked well and the London Fire Brigade threw a lot of resources at bringing the blaze under control. Once the lessons are learned it will be an opportunity for all centres to review their planning and adapt their procedures.

Graham Parker
Editor, Retail Destination



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SOVEREIGN CENTROS WINS CHESHUNT DEVELOPMENT

Broxbourne Borough Council and Hertfordshire County Council have selected Sovereign Centros as their development partner for a £400m mixed use scheme at Brookfield Riverside, Cheshunt, Hertfordshire.

Sovereign Centros' appointment follows a competitive tendering exercise run by the councils' advisers, Cushman & Wakefield. The scheme will include a range of leisure facilities, including a cinema, as well as employment space, homes and shopping; all in a high-quality, sustainable location.

Sovereign Centros chief executive Chris Geaves said: "This is an amazing opportunity to develop in a very underdeveloped and untapped segment of the country on the edge of London to create a development which is really different to that anywhere else in the UK.

"The mixed-use nature of the scheme will be hugely appealing and it will recognise and address in particular how retailing and leisure is changing and provide something which is totally appropriate and relevant but equally exciting. We are really looking forward to taking it forward".



READING REVIVED

Inception (Reading) has been granted two detailed planning consents that will broaden the mix of uses at Broad Street Mall in Reading. Reading Borough Council has granted consent for a new 16,000-sq ft food market on Hosier Street as for a 101-bedroom Premier Inn hotel with a 150-cover restaurant at ground floor level.

Iceland committed to relocating from Weldale Street in the town centre last year and signed a 10 year lease on a new 9,000 sq ft store. Part of the former Argos store, the space has been reconfigured and will also incorporate a new boutique cinema and additional retailers. New Look and Poundland have also just committed to their long-term future at the centre by signing new 10-year leases.

Moorgarth's managing director Gary Lewis said: "This

is an exciting step forward in the rejuvenation of Broad Street Mall and the first phase of the regeneration of Hosier Street. Recently a number of key retailers have committed to the centre and plans are underway to broaden the leisure offer."





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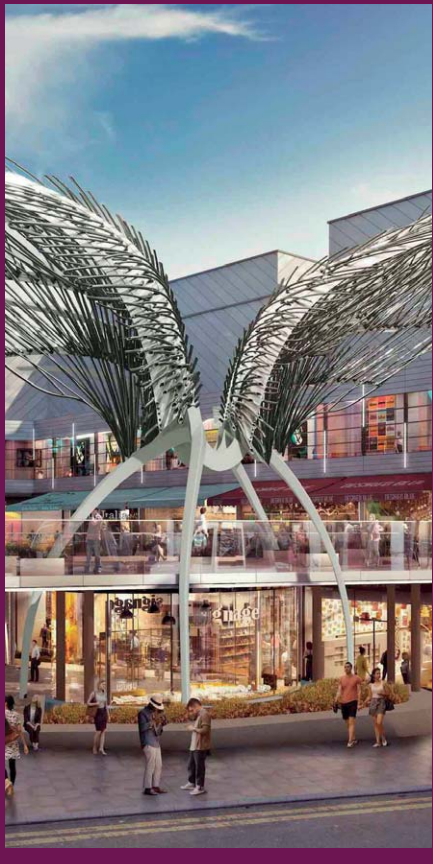
UNIQLO AT THE DOUBLE

Japanese fast fashion brand Uniqlo has signed for two large-format stores in Islington and Watford as it makes a renewed attempt to crack the UK market.

CBRE Global Investors has signed the brand as the anchor tenant for the new development at Angel Central, Islington. The new 15,500-sq ft bespoke unit covering 5,300 sq ft on the ground floor and 10,200 sq ft at basement level has been created for Uniqlo opposite H&M and is set to launch in late 2019.

And Uniqlo will be the latest retailer to open at intu Watford following intu's £180m investment to extend the town centre shopping destination by 400,000 sq ft and attract a range of big brands. Uniqlo's two-storey intu Watford store will be only its fourth store outside of London.

CBRE and CWM acted for Angel Central. CBRE represented Uniqlo.



WATERLOO RETAIL PLANS UNVEILED

Developer LCR has launched Waterloo.London – a new 135,000-sq ft retail and leisure scheme in the heart of the South Bank.

Set within the RIBA Award-winning former Eurostar terminal at Waterloo station, the scheme will open in Spring 2021 with 40 new glass-fronted units over three floors. The scheme will include public spaces along a new pedestrianised street, the Waterloo Curve.

At its centre will be Time Out Market London – Waterloo – a food and cultural market that will bring the city's best chefs, drinks and cultural experiences under one roof. Time Out Market London – Waterloo will occupy two floors at Waterloo.London and accommodate around 500 covers.

LCR development director Adrian Lee said: "Waterloo.London will set a new benchmark for progressive retail and transport destinations in the



UK. Brands will have a truly unique opportunity to tap into a market of Waterloo's 100 million passengers, the 20 million tourists that visit the South Bank every year, and its surrounding vibrant community and growing office population."

Cushman & Wakefield and Union Street Partners are joint leasing agents for Waterloo.London.

FOUR SIGN AT FOSSE PARK

Nando's, Greggs, KFC and EE have confirmed they are taking units at Food Central, the new dining space at the Crown Estate's Fosse Park, Leicester. Combined with the Fosse Park West extension, Fosse Park will see up to 140,000 sq ft of additional retail and restaurant space in 13 food units and four retail units.

The evolution of and the investment for the redevelopment of the Food Court, now valued at £168m, includes a £5m placemaking and public realm investment in the existing centre. This will deliver new communal areas and event spaces, complemented by improved landscaping, widened walkways and

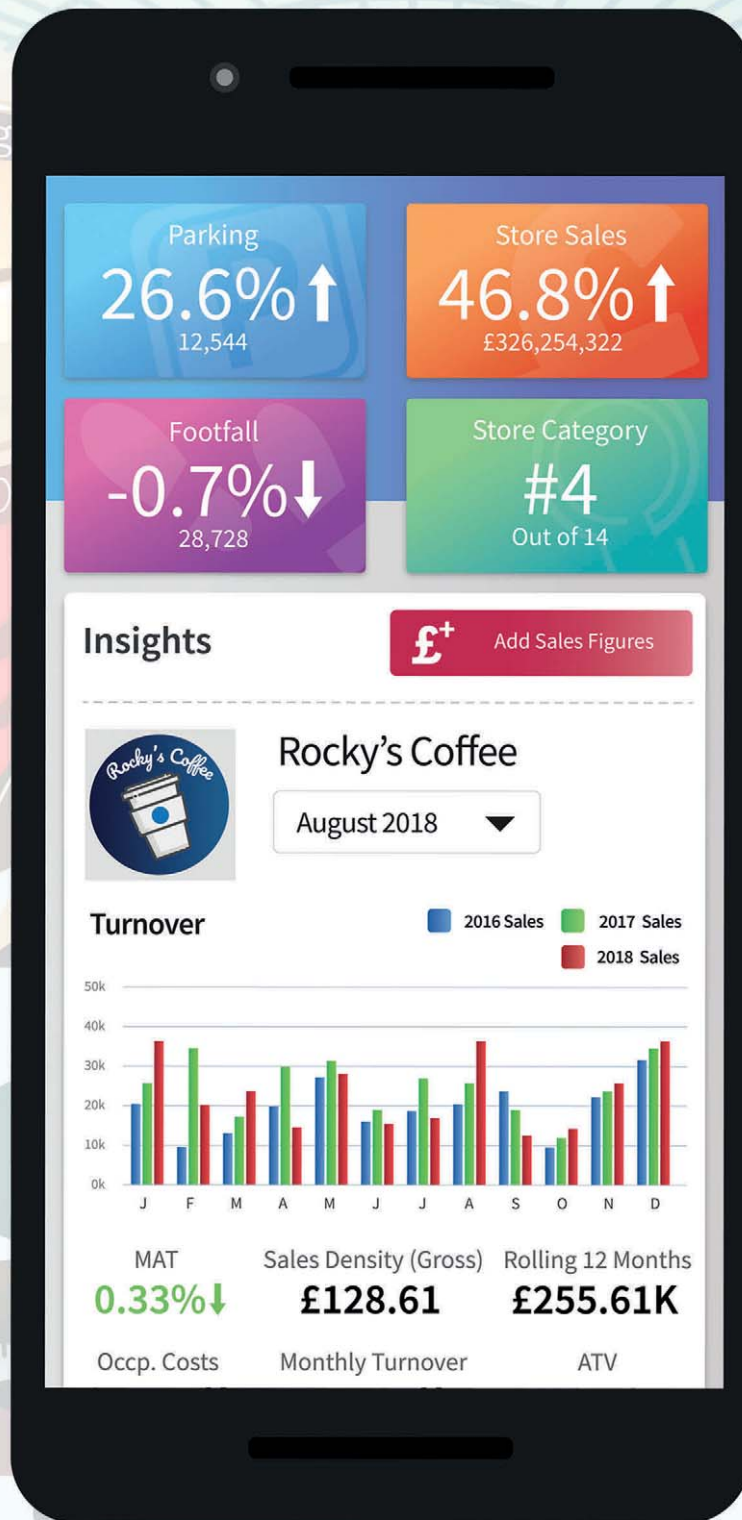
enhanced accessibility.

Next, Clarks and TK Maxx are already committed and the scheme is more than 45% pre-let. However, following the approval of its CVA, Debenhams has confirmed that it will not be progressing with its new store.

Mike Bell, senior asset manager at the Crown Estate, said: "Following the news that Debenhams will not be taking a store at Fosse Park, we have been actively working with the local authorities on our future plans and engaging with the market to explore exciting new brands for the space when it opens in 2020."



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PORTSMOUTH RETAIL PARK REVAMPED

The Crown Estate has secured a raft of new lettings at Ocean retail park, transforming the retailer line-up and investing £650,000 to enhance the overall experience for shoppers at the park.

The most recent lettings include Lidl, Smyths Toys and a popular homewares store and follow a series of lettings over recent months, with M&S Foodhall, Boots and Card Factory also joining the park. The new lettings continue to increase the popularity of Ocean retail park, with consumer footfall growing 14% over the last 12 months.

Lidl is set to open a new 25,000 sq ft store, the homewares store 26,000 sq ft and Smyths Toys 15,000 sq ft. All three are targeting an opening of Christmas 2019.

The opportunities for new retailers to join the park follow the closure of the Homebase and Toys R Us stores in 2018, and PC World consolidating its presence at Ocean retail park into the Currys PC World Megastore. Over the past 18 months, the Crown Estate has reconfigured and re-let 90,000 sq ft across the park.



HUDDERSFIELD REGENERATION PLANS START TO TAKE SHAPE

Kirklees Council has launched **The Huddersfield Blueprint** - a ten-year £250m vision to create a 'thriving, modern-day town centre'. The **Huddersfield Blueprint focuses on regenerating six focus areas in the town centre: Station Gateway, St Peter's, Kingsgate and King Street, New Street, the Civic Quarter and the new Cultural Heart.**

The overall costs of The Blueprint scheme could be up to £250m, with funds coming from national government, private investors, West Yorkshire Combined Authority and Kirklees Council.

In the first sign of new investment in the town, Light Cinemas has signed a 25-year lease to operate the nine-screen cinema that will anchor

new leisure and lifestyle space at the Kingsgate shopping centre.

The announcement follows Kirklees Council's decision to grant planning permission to convert the House of Fraser unit at the centre into several restaurants and a street food area on the lower ground floor with the multi-screen cinema on the upper floor.

In addition, the Kingsgate development works will include the creation of the cinema's Sky Bar complete with an external slide that can convey guests from the bar to its lobby.

Construction works will commence in early 2020 with the cinema set to open by Spring 2021.



INTU SQUEEZES TWO DEALS OUT OF MANGO

Intu is set to welcome two new Mango stores to its centres, as the premium international retailer continues with its model of opening larger-format stores. Mango has signed up for space in two of the UK's premier shopping destinations, **intu Watford** and **intu Merry Hill**.

The two new stores opening at intu Watford and intu Merry Hill combined will comprise almost 11,000 sq ft of selling space and are part of Mango's ambitious plan to open almost 65,000 sq ft of new selling space in 2019.

At intu Watford, Mango is the latest retailer to join intu's multi-million-pound redevelopment and extension project. The new store at intu Merry Hill will be the only Mango in the West Midlands outside of Birmingham.

Julian Wilkinson, asset management director at intu, said: "These two new Mango stores are an example of a premium international retailer choosing to invest in the very best British locations, where brands can really flourish."





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SUCCESS ON THE STRAND

Managing an intensively used historic building presents unique challenges for Incentive FM

London's historic Somerset House is run by a not-for-profit trust, who's remit is to generate income from lettings and events with any surplus reinvested in the buildings and in the arts. The estate includes exhibition, event, office and retail facilities across 6.5 acres over six floors, with more than 500,000 sq ft of lettable space.

And events are a key part of the mix. These events include the open-air cinema season, concerts, exhibitions and the world-famous courtyard ice rink running through the winter months. With more than 3 million visitors a year, up from just 900,000 ten years ago, Somerset House is the sixth most visited site in the UK.

"That takes its toll on the building," says Mick Figg, head of buildings. "The trust only has 70 staff so we have to outsource, and by bringing in Incentive FM we effectively doubled our operation." Incentive FM's 60-strong team provides management, cleaning and maintenance services to support the trust and its tenants as well as providing services to the varied events that take place on site.

Incentive FM managing director Bruce McDonnell points out: "Usage can double in one day and that has a huge impact on service levels. One week there is an ice rink, next week there's a concert and the week after there could be an exhibition. We have to make sure we're rightsizing all of the time."

When there is a concert up to 4,000 people pack the courtyard but by the time the office users arrive in the morning everything has to be back to the status quo. "We run some events internally and for other events the space is let out temporarily, but all users have to contract with Incentive FM to ensure continuity of service," Figg explains.

Somerset House has more than 100 tenants including Kings College's postgraduate law school, the British Fashion Council and the world-renowned Courtauld Institute. Figg describes it as the biggest collective of creative users in the UK. The space is 100% let, with a waiting list, but the trust doesn't let to just anybody. "We're a community," explains Figg. "People are judged on what they can add to the collective before we will let them space."

The studios that occupy the basement area epitomise this approach. "Things are created, made and sold here," says Figg. "We let that space at cost price to put something back."

Built in the late 18th century to house the Navy Office and the Tax Office, Somerset house was still occupied by HMRC at the beginning of the 21st-century. The trust was set up to find a new use for the property, taking it back from the taxman wing-by-wing. The building has been given what Figg calls a 'light-touch' refurb. "Our approach is to work with the building," he says.

"To be given a grade 1 listed building and to take it through that journey – to make it current – has been the biggest challenge," Figg continues. "We are providing 21st-century office space and our tenants shouldn't expect any less than they'd receive anywhere else in Midtown."

And the same approach applies to the ongoing management. "Our priority is to make sure the buildings' integrity and heritage are protected," McDonnell says. "It's a 230-year-old building. There were no manuals then." Every member of the Incentive team is given heritage training to explain why it is important to use the correct cleaning materials etc.

"No two days are the same. There isn't a spec – it's about us being trusted advisors and protectors of the building," McDonnell explains. "It's not a contract where you can turn up, do what it says in the manual, and leave. The change in the usage and the volume of demand over the contract period means that if it was a traditionally procured FM contract it wouldn't work."

Figg describes the contract as "Total FM minus security.

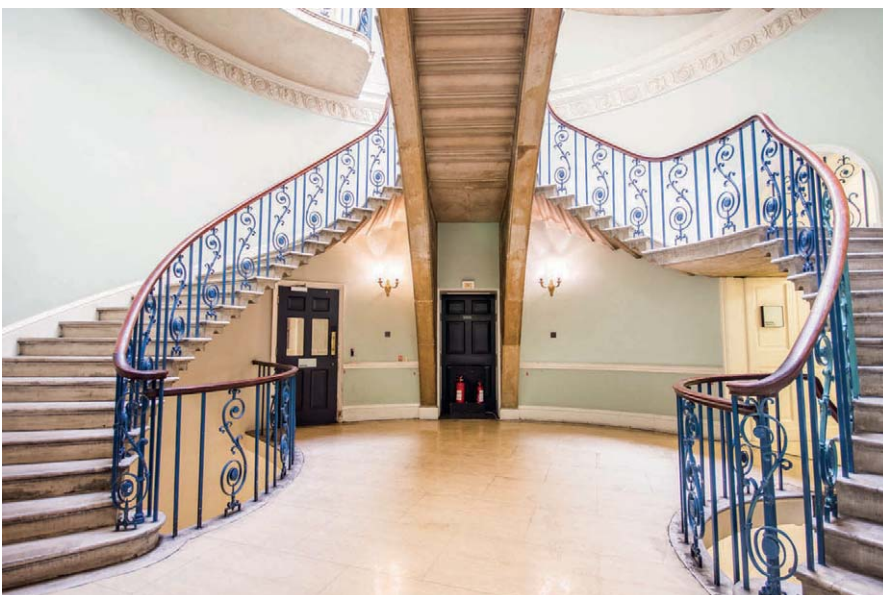
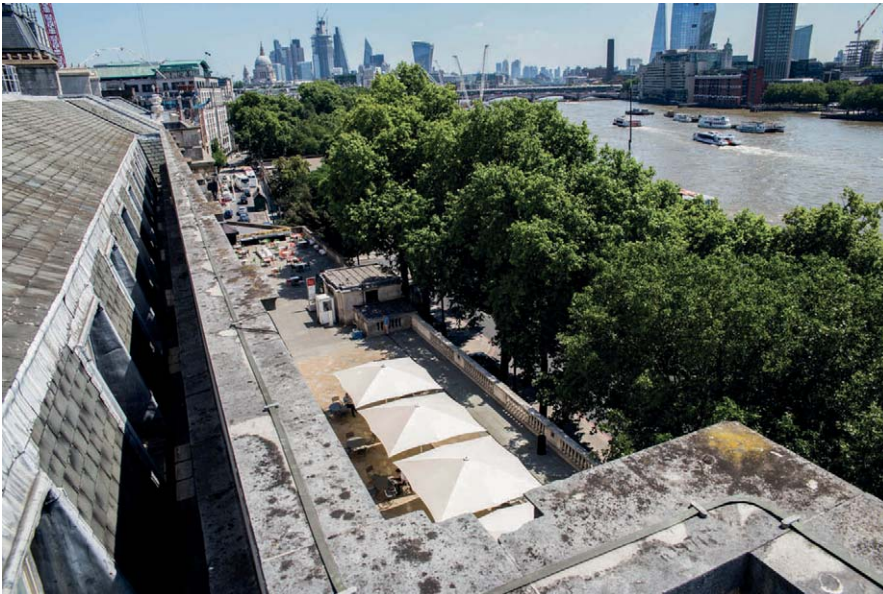




We went that way because everything that needs to be joined up to cope with the speed that things happen here.” And now the trust is just about to sign a new contract with Incentive, running for three years with an option to extend.

Another factor that Figg is especially proud of was the decision to become one of the first London Living Wage employers. “We found at some efficiencies to pay for it,” he explains. “It’s important to invest in the people who work here. For some there was a 40% uplift but we got outputs to pay for it.”

“The biggest joy is just seeing people, who were never able to come in before, enjoying the building,” Figg concludes.



RETAIL TRANSFORMATION

Smith's Court in Soho has been turned into a thriving mixed-use destination by focussing on tenant mix.

Smith's Court in Soho has become a niche retail destination, punching above its weight in terms of the brands it has attracted. So how has what was once a problem property become a prized mixed-use asset?

Richard Brecker of managing agent Brecker Grossmith explains: "We'd been managing the property for many years and have struggled to find a tenant that the landlord would accept. There were problems with vagrancy, drugtaking and antisocial behaviour."

Because there is no passing footfall, the solution was to find a tenant mix that would turn Smith's Court into a destination. "Our aim was to hand-pick people who might add value. To begin with we experimented with pop-ups through Appear Here, but we found the tenant mix lacked a theme. I felt this was a wonderful opportunity to be creative and see what we could achieve."

Now, Brecker compares the property to Coal Drops Yard, the 100,000-sq ft retail scheme at King's Cross. "We are much smaller, but attracting the same retailers," he says.

Tenants now include William Curley, the award-winning





chocolatier who also has a concession in Harrods; Hideaway Coffee, which moved from Borough Market; Second Shelf bookshop, specialising in books for and by women; Bibi's Kitchen and Mr Mullans' General Store. And now leading-edge fashion store Vertice is relocating from South Moulton Street.

"It's been a long journey but for the first time ever it's going to be fully let," says Brecker. "It was done on a minimal marketing budget but through a lot of hard work we've got there. We approached hundreds of targets with dozens of viewings.

"We used planting to give the courtyard a bit of a lift, and it's very satisfying and rewarding to see a community spirit emerging – the tenants now have their own collective Instagram page."

And for Brecker one of the most satisfying elements of the project has been engaging with start-ups. "Property isn't just about square feet and bricks and mortar, he says. "There are human beings who are on a journey and you have to engage with them. Working with people who are at the start of their business or who are opening a new chapter is very exciting."



BRAND POWER



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How are fast food chains keeping up with the trends?

Opening its doors in 1955 in Illinois, McDonald's recently celebrated its 64th birthday and remains a fast food industry stalwart, continuing to rise to the challenge of keeping relevant and on top of the constantly shifting backdrop of economic and social change. With that in mind, just how do the fast food behemoths manage to stay ahead of consumer expectations?

"Arguably, the biggest challenge the fast food market has had to overcome is constantly shifting dietary preferences – whether that be pulling themselves back from the BSE crisis in the 90s or meeting the needs of a nation increasingly focussed on clean eating, whole foods, vegetarianism and veganism," says Matt Maynard, director at Lunson Mitchenall.

He notes how both McDonald's and Burger King have focussed on evolving their menus to respond to this and consumers' commitment to the sustainable sourcing of ingredients by offering a variety of health conscious and low-calorie options: "They have tweaked many favourite dishes and the marketing of said dishes to make sure they are still appealing and healthy - for example, avoiding artificial colouring, promoting the use of 100 per cent beef and replacing frying oils with healthier alternatives."

The big players in fast food, where the consumer turnover is far higher, have been early-adopters of technology, far sooner than some of their other casual dining peers. From digital ordering, number plate recognition at drive thrus or payment solutions, these brands are using technology to their advantage to ensure the very nature of the whole experience is literally what it says on the tin – fast.

Maynard believes that there is definitely room for other occupiers to learn here, particularly if they are looking to target the millennial pound: "They were also very early adopters of free WiFi and have been engaging on social media for years," he points out. "Whilst that is now becoming the norm, it goes to show the commitment to evolving with the times."

The fast food fit outs of the present day are a far cry from the sticky tables and plastic chairs, with a renewed focus on ambience and aesthetics playing a central role. This trend comes on the back of the gourmet burger chains and restaurants that have grown in popularity in the last 10 years.

"Burger King has been exceptionally quick to recognise the impact a quality look and feel has on dwell time and is upping its game considerably by continuing to invest in and improve its restaurants," says Maynard.

The world is certainly a very different place to what it was in the 1950s when McDonald's first launched, with many competing brands coming and going over the decades. Maynard adds that, although it is the successful brands like Burger King and McDonald's that are in the minority, their longevity is attributable to their continued efforts to have a responsive and direct relationship with their target customers: "Their heritage, USP and offering is understood and recognised and as long as the price of a Big Mac is still considered when discussing consumer spending and inflation, it is likely to stay this way," he concludes.





LEGRIS
MUSSELS D'OLEANNE
MUSSELS D'OLEANNE

MAISON PUIPPIER
MAISON PUIPPIER

KITCHEN MAINTENANCE

NSI calls for a new 'MOT' style approval scheme for fire protection in commercial kitchens

Data reported by BAFE, the UK's independent register of quality fire safety service providers, has revealed that food and drink related kitchen fires are statistically the third most likely cause of large fires, behind only 'hot work' and arson.

In the last year, there have been a number of media-reported 'large fires' in supermarkets and food-stores as a direct result of having insufficient fire protection measures in place, which could have been extinguished, or at least contained, were safety standards better maintained.

It is common legal practice for cars on the road to undergo yearly maintenance checks, MOTs, which were introduced by the government in 1960 in response to the number of accidents caused by vehicle faults. The National Security Inspectorate (NSI), led by chief executive Richard Jenkins, has begun applying the same principal to fire safety in commercial buildings with its new accreditation.

At present, mitigating risks of fire breakouts by installing a kitchen fire protection system is recommended by the government, but not mandatory. These systems are designed to protect premises and prevent the spread of fire to other parts of the building, and act as a safeguard in protecting the public.

The NSI says that fire protection and related services should be fit for purpose, properly installed and maintained in accordance with manufacturer's instructions and recognised industry standards. The legislative responsibilities demand that competent companies design, install, commission and maintain kitchen fire protection systems.

"The Responsible Person or Dutyholder might assume, incorrectly, that maintenance providers working on other fire protection equipment for example, fire detection and alarm systems or portable fire extinguishers, may be capable also of working on kitchen fire protection systems," says the NSI.

But if this is not the case, how can a Responsible Person be confident that installation and maintenance is indeed in line with the highest standards of safety and therefore demonstrate they have fulfilled their responsibilities? The answer in large part can lie in third party certification.

BAFE has challenged that in the case of commercial kitchen fire protection systems, their MOT-style scheme for kitchen maintenance could save a great number of lives.

The new NSI/BAFE approval scheme demands: regular audit of contractors, an ongoing monitoring regime verifying engineer training and competency is applied in practise, design integrity of new installations is sound; ongoing review of system suitability in adapted environments is practised and maintenance of installed systems effected. All this over and above manufacturers demanding engineer training a prerequisite for product distribution rights.

NSI independent audit including their maintenance schedules and system installations. Both newly installed and maintained systems, authorises approved installers to issue NSI/BAFE Certificates of Compliance for installations, much like an 'MOT' for a motor vehicle.

Responsible Persons and Dutyholders can now demonstrate their due diligence in providing safe environments to building occupiers and visitors by holding an NSI/BAFE Certificate of Compliance for Kitchen Fire Protection Systems in their properties.

The NSI says that choosing one of their approved third party companies working to BAFE SP206 guidelines to carry out necessary works should give confidence that the service provider has been subject to independent inspection of its business practice and will carry out the job in compliance with regulations.

The NSI adds that retail destination operators should be aware that the new NSI/BAFE scheme has the broad support of insurers. Checking the terms of your policy with your insurer regarding any new kitchen fire suppression installation, adaptation of an existing installation or appointing qualified maintenance contractors is to be recommended.

Additionally, insurers are convinced fire risk to people and property will be reduced as this commercial kitchen fire protection systems scheme is adopted, and 'MOT' Certificates of Compliance issued for each professionally managed system.



FROM KITCHEN TO LANDFILL

How data can help tackle the £3bn in commercial food waste each year

Hundreds of thousands of tonnes of food is wasted in the UK every single year, with the hospitality and food service sector among the worst offenders when it comes to sending food straight to landfill. Food charities such as FareShare are taking it upon themselves to divert whatever food they can to stop edible food from ending up in the bin.

“Food waste is not just a social issue, it’s also an environmental one” says James Persad, head of marketing and communications at FareShare. “When we waste food, we’re also wasting all the resources that went into growing it. Once food ends up in the landfill it’s also a major driver of climate change.”

The good news is that thanks to new grant funding from DEFRA to offset the costs of redistributing their edible surplus to good causes, FareShare can now help food companies unlock more surplus from their operations. The fund will make it easier and more affordable for businesses to send their surplus to frontline charities.

“A raft of new sustainability and food wastage initiatives is focusing the attention of food service and hospitality providers,” says Peter Ruffley, chairman of Zizo. “Wasted food from kitchens is increasingly being repurposed by a number of great charities, which is a great start but should not distract from the bigger issues within the end to end food production supply chain.

“In addition to improving the measurement and monitoring of food production within kitchens, it will be the sharing and analysis of data from manufacturers, 3PLs, processors and hospitality that will be key to achieving the ambitious targets in reducing wastage.”

Creative initiatives to tackle the £3bn of food wasted by the food service industry every year are consistently popping up, but with a target to cut food wastage in half by 2030, the companies within the sector need to actually work with these initiatives, such as FareShare, which repurposes and

redistributes food surplus, in order to meet those targets.

Whilst these measures are necessary, it ignores the reason that so much food is going to waste in the first place: companies not actively monitoring and measuring the entire food preparation process.

According to research from Wrap, the average benefit-cost ratio for food waste reduction was 7:1 over a three-year time frame. And key to achieving this benefit is data driven understanding; from measuring food waste, to rethinking inventory and purchasing practices and reducing food over production.

Food waste is highly visual – and with the right approach, companies in the sector should easily be able to map trends that lead to high volumes of food waste. Brands need to ask: are some menu items routinely uneaten? Can portion sizes be reconsidered? In many ways the trend towards fresh, local and healthier eating has made it more difficult to manage and reduce wastage, but measuring trends in food utilisation and consumption can quickly reveal opportunities to reduce portion size, tweak menus and rethink supply.

Making cultural shifts can also prove successful, with acts such as reducing menu sizes to change customer expectations about what products are sustainable to demand. If a product is too often going to waste or has a large carbon footprint in the supply chain, then brands should consider removing it from their menu. The modern consumer is used to having whatever they want at their fingertips, and it is time for brands to step up the driving force in saying no to unsustainable food components.

Additionally, the final problem that is easily fixed comes from organisations with supply chains that stretch around the world being unlikely to have information from multiple manufacturers or third-party logistics about wastage or fuel consumption before it reaches the consumer. To achieve any meaningful insight into environmental impact will require a collaborative approach to data sharing if food overproduction is to be addressed right from the beginning of the supply chain.



KEEPING WATCH

The complexities of GDPR compliant surveillance

CCTV cameras are a fact of life. Six years ago, the British Security Industry Association (BSIA) estimated there were nearly 6m in the country, including 750,000 in “sensitive locations” such as schools, hospitals and care homes. Whilst other estimates put the national tally far lower at 1.85m, it is virtually impossible to clarify the figures, but what is clear is that you are being caught on camera every single day just by leaving your house.

A recent investigation by property security company, Clearway, has revealed worrying levels of non-compliance with the new General Data Protection Regulation (GDPR) which came into force last year, particularly where the use of CCTV is concerned.

The biggest issue from the investigation showed that management responsible for CCTV surveillance have neglected to read regulations thoroughly, with many believe incorrectly that certain rules do not apply to them, or that they simply do not understand what some of the rules actually mean.

As streets are practically brimming with CCTV cameras,

recording details of people's comings and goings for review, most people have accepted this as a small compromise of their privacy to enable crime prevention and their general protection.

The average UK resident is seen by CCTV approximately 70 times per day. Regulations demand that people be made aware when they are being recorded, but the likelihood is that most of us rarely notice even a single surveillance camera that is capturing and recording us as we go about our daily life. And the likelihood that people are aware where these images are stored and what is being done with them is close to zero. So are they really a crime deterrent?

"The whole point of CCTV is security, and its deterrent factor in part, as well as recording the criminal activity to assist law enforcement bodies in detecting the perpetrators" says UK CCTV manager at Clearway, Andrew Crowne-Spencer. "Therefore, if trespassers or criminals don't even realise they're on camera, as is what we suspect in a lot of cases, what sort of useless deterrent is that? And, just how good are the images the cameras are supplying?"

"If they're grainy or blurred due to old or faulty equipment, or not set up correctly, that doesn't help anyone except the trespassers or criminals. Ten years ago it was reported that 95 per cent of murder cases investigated by Scotland Yard used CCTV footage as evidence, yet latest data suggests 80 per cent of footage now available is of such poor quality it's almost worthless. That apart, don't these companies or organisations, even public sector ones, realise if they're not properly complying with the GDPR Regulation they can be penalised because of it? Sometimes to the tune of many thousands of pounds?"

One year on from the introduction of the new GDPR, Crowne-Spencer cites some of the key failures that came to light in Clearway's investigation of its own extensive nationwide client and contact list:

Failure to fit signage or keep the information on it accurate; Failure to carry out a GDPR risk assessment prior to CCTV deployment; leaving digital video recorders unlocked or unsecured so anyone, not just designated security personnel, have access to footage; failure to ensure the lenses of CCTV cameras are not appropriately directed or are masked so that inappropriate footage is not recorded, and, if the data is shared with other parties, for example to monitor specific individuals, then innocent people are blurred out, a simple matter to deal with using appropriate modern software; having CCTV monitors which are viewable by the public; Failure to have trained staff to monitor the CCTV; leaving usernames and passwords as default settings or noted next to the equipment; and if the images are to be shared with other organisations, such as the police, TfL, or other security service providers, failure to manage this appropriately to conform to Regulations.

Crowne-Spencer describes a case where the settings on

the equipment not being right, specifically the date and time were incorrect and two systems on the same site had times set 17 seconds apart.

"It might sound petty, but there was a break-in and when the intruder was arrested police showed the CCTV footage in court. The defence barrister then asked for all camera footage to be played at the same time.

"As the intruder was seen on two systems at the same time (due to the timers not being synced) the barrister claimed the evidence was inadmissible as it was clearly inaccurate since how could the intruder be in two places at once? Case dismissed due to lack of evidence!"

The message from all this is simple: Check your CCTV systems are doing what they should and you are complying with the Regulations. Because someone, somewhere will be watching what you are doing sooner or later.

COST-CUTTING CCTV

With latest figures revealing UK retailers spent an enormous £1bn last year tackling retail crime, a first-of-its-kind initiative by cloud storage provider Ocucon, could help save businesses tens of thousands of pounds and transform the retail crime landscape.

The security surveillance company has developed a fully managed Video Surveillance as a Service system, offering a free upgrade of all CCTV hardware for customers of its standard cloud-based storage package, as it launches a zero capital expenditure model in the surveillance industry.

Whilst CCTV is commonplace in the retail sector, the potential to utilise the very latest in cloud-based surveillance analytics and software can be problematic for some retailers due to compatibility issues with existing CCTV infrastructure or the high costs associated with replacing hardware.

The Ocucon solution delivers a cloud-based storage and retrieval platform which combines intelligent data analytics with the facility to store, analyse and retrieve unlimited amounts of HD video surveillance footage, removing the physical limitations on the amount of footage retailers can store.

"From the outset, [our] aim has been to break new grounds in surveillance technology and revolutionise the way in which businesses and organisations record, store and access their CCTV footage," says Ocucon co-founder Gary Trotter. "We know that many retailers are struggling with legacy CCTV systems that are costly to replace and prevent them from utilising industry-leading software and analytics or have had to compromise on the number and specification of the cameras they have installed on their premises.

"By working closely with our partners and reimagining the typical surveillance business model, we're now able to offer customers the benefits of new CCTV hardware alongside our industry-leading cloud storage, with zero capital expenditure from the customer."

THE BENEFITS OF BODY CAMS



Why security staff should be wearing bodycams

In the modern workplace environment, the need to protect employees and customers has become more prevalent than ever, with the duty falling to employers to protect the health, safety and welfare of their staff and shoppers. Security staff should consider becoming equipped with body camera technology to capture and record video evidence to ensure that they are adhering to industry regulations and protecting employees.

The HSE estimates that it can cost between £17,000 and £19,000 on average just to investigate a physical assault. It can cost a lot less to prevent one. If an incident does occur, the courts will take the resources available to an organisation into consideration – the Sentencing Council guidelines state that a Corporate Manslaughter fine should be at least £500,000.

It is a weak defence for an employer to say that they did not have the time, money or resources to reduce risk. There is the possibility of courts imposing publicity orders which can ruin reputations, and in the worst cases, prison sentences for senior managers found to be negligent.

Having security teams wear body cameras can help prevent and de-escalate confrontational situations that lone workers and public facing employees, such as mall workers, regularly find themselves in. Recording and gathering

video evidence during an altercation or emergency offers a quicker resolution to complaints, improves organisational transparency and provides training opportunities for employees.

Lone workers, for example, which make up around a fifth of the UK working population, regularly carry out duties in isolation or in environments without supervision and having a body camera gives a clearer picture of any incident that might occur, negating the possibility of a he-said she-said situation.

In regards to the legality of bodycams, the Security Industry Authority says: “Individuals who view footage recorded by headcams/bodycams are likely to fall within the definition of public space surveillance (CCTV) activity.

“If you are employed to use CCTV equipment to monitor the activities of a member of the public in a public or private space, other than for the purposes of protecting property or identifying a trespasser (e.g. if you use CCTV to guard against outbreaks of disorder), and this

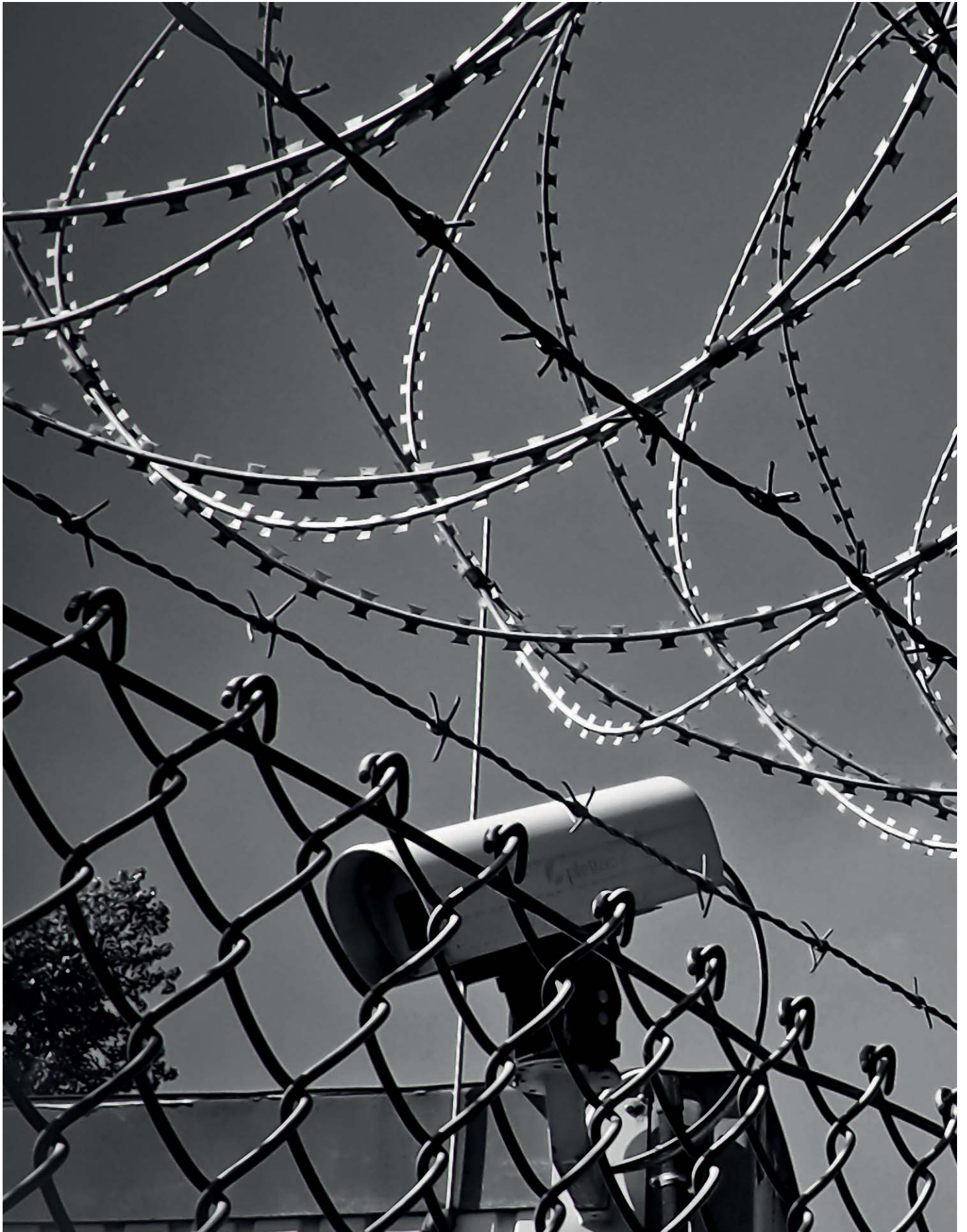


activity is carried out in connection with any contract for the supply of services, then you will require a Public Space Surveillance (CCTV) licence.”

More than being simple cameras, bodycam technology has become more and more advanced in recent years, such as those from bodycam specialist, Hytera. The most important features of modern bodycams, according to the expert in the technology are: durability, ensuring that the camera is tough enough to withstand harsh working environments; long battery life to give constant coverage throughout the working day; wide angled and high quality recording to make sure nothing is missed; emergency buttons for lone workers who need immediate assistance; and a good data collection and management system.

The latter function is offered by the Radiocomms-recommended Hytera software. The Hytera Digital Evidence Management (DEM) software platform collects and stores all the digital evidence from the Hytera recordable bodycam. By docking the device into the specially designed multi unit charger, audio, video, and images are automatically exported directly to the DEM platform. This can all then be accessed safely and securely for review.

Whilst it may seem excessive and borderline invasive to some to have security teams installed with bodycam technology, when used lawfully they are an essential piece of technology in providing clarity when real life situations present themselves.



NETWORK SECURITY

Protecting your public network

Whilst they are an all-but-necessary offer at shopping centres, public Wi-Fi networks are a minefield for security breaches, and many users lack confidence in how the data they are providing over public networks is being managed – just not enough to stop using them. Which puts the responsibility in the hands of the Wi-Fi provider to ensure that user's data is safeguarded.

"In-store Wi-Fi networks are often considered soft targets by hackers, especially complimentary customer Wi-Fi, which can often have a lower security threshold compared to operationally critical networks that support epos systems, for example," says Roy Reynolds, technical and security expert at Vodat International.

It is not uncommon, he says, that hackers will spoof a corporate network to look like a business' guest network. Some easy checks to make sure this is not happening would be ensuring that there is not more than one network coming up for the same company.

"If there is," says Reynolds, "check with the company which is the correct address and network. It is also worth looking at the log-in page, as often the fake one will have spelling mistakes and poor grammar or ask for information which would not be normal for a genuine website. If in doubt, it is worth setting a VPN."

He advises that shoppers and staff exercise caution and common sense when they log on, such as: limiting the data which you share, making sure you trust the network which you are connecting to, and ensuring you read all the conditions and are fully aware of what you are signing up to. It is also important to monitor Bluetooth connections as this can be another entry point for criminals.

"Without sufficient Wi-Fi security a hacker can access a network, monitor data traffic, disrupt transactions and even launch a denial of service (DDOS) attack, stopping a centre from trading altogether," says Reynolds.

Reynolds says there are four steps managers should adopt when it comes to keeping their Wi-Fi network secure:

- **Go beyond simple passwords:** Multi-factor authentication such as tokens and push notifications sent to mobile phones are significantly more secure than traditional password access to Wi-Fi networks.
- **Divide and secure your network:** Make it difficult for hackers to move around if they manage to breach your Wi-Fi system. For example, if they've accessed data stored this should not automatically give them access to your POS system. Each part of your system should be secured in isolation.
- **Use automatic monitoring:** Deploy software that can automatically monitor your network, looking for suspicious activity or strange data flows. Once alerted you can stop a potential attack before damage is done.
- **Educate your staff:** Staff awareness of security issues and processes is a vital part of any strategy. Undertake regular training to ensure all understand what is expected of them.

"For customers," he adds, "a number of security solutions are available to be able to put on the network to prevent hackers getting into the network to access these devices – but this only works if it is a device which is authorised to access the network."

"For individuals, just like for the business users, they can install added security software onto personal devices, which would make it more difficult for hackers to gain access by adding more security when signing in."

He also advises that malls should educate their shoppers and suggest to them that devices which access public Wi-Fi networks should have antivirus software and firewalls enabled: "Shoppers should also verify the network is genuine before joining and turn off the sharing function. Ultimately, using a VPN is usually the most secure option for surfing public networks."



Roy Reynolds, technical and security expert, Vodat International

PERIMETER PROTECTION

ATG Access director Iain Morgan talks road blockers, bollards and barriers.

The physical security threats faced by shopping centres are serious and diverse. Ram raid burglaries, in which heavy vehicles are used to break into premises with the purpose of stealing either goods or even entire ATM machines, are reported to be on the rise in some regions.

Vehicle attacks targeting crowds of unwitting shoppers are one of the major terrorist threat types that police and security services are battling. And whilst less sinister, the risk of unfortunate accidents such as falls and minor vehicle incidents are a constant threat in any environment attracting large crowds of visitors. As such, effective perimeter security is a key concern for all shopping centres.

“Such security needs to adequately protect visitors from the threat of vehicle attacks and accidents – yet simultaneously facilitate the smooth flow of pedestrians and legitimate vehicles alike into and out of the shopping centre,” says Iain Morgan, director at barrier expert ATG Access. “After all, traffic bottlenecks can in themselves cause further security threats. Achieving these contrasting goals can be complex – and it is made even more so when older shopping centres need to retrofit their premises with newer perimeter protections.”

Happily, Morgan acknowledges that perimeter security technology has evolved and enhanced dramatically in recent years, and there are now plenty of options available which can not only provide robust protection for shopping centres, but even enhance the aesthetic appeal and usability of public spaces.

Shallow mount technology, he says, has developed



enormously in recent years, combatting many of the cost and inconvenience problems of traditional bollards with deep foundations: “Shallow mount bollards use less concrete and are far quicker to install, taking between one and two hours per bollard – which makes them far less disruptive to deploy around shopping centres which need to remain open throughout the installation.”

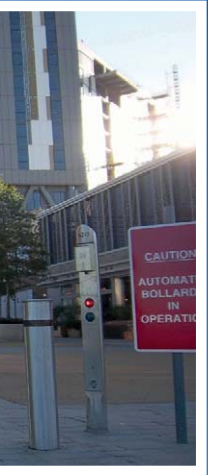
Temporary barriers are another option to consider. “Again,” Morgan continues, “technology here has evolved a great deal in recent years, meaning that temporary perimeter barriers can provide truly robust and resilient security whilst more permanent measures are installed. This can enable shopping centres to improve their security risk posture immediately, whilst taking a strategic and long-term approach to perimeter protection.”

Meanwhile, there are many innovative ways in which environmental design and clever aesthetics can be combined with security strategy to deliver perimeter protection which simultaneously enhances the physical environment of shopping centres. Specially designed robust street furniture, for example, can double up as a security measure and create usable, pleasant public spaces at the same time.

Clever and careful design of walkways, landscaping, positioning of lighting and security cameras can all go a long way to directing pedestrians around shopping centres and their surrounds in a safe and secure way, managing dwell time with security in mind and encouraging a safe flow of people.

“Physical security should be a key priority for all shopping centres,” adds Morgan. “Visitors must be protected from the risk of violent crime as well as accidents. But perimeter security need not be cumbersome, ugly or even overly costly to install – it can genuinely act to enhance the shopping centre environment as well as keeping it safe.”

waitrose John Lewis





THE IMPORTANCE OF ACCURATE DATA



Hoxton Analytics' Seb Ellson talks people counting

Retail destinations want to know as much about the people who pass through them as possible: What demographic are they? What are their shopping patterns? And above all, how many of them are there?

Footfall counting has long been a system in place at retail destinations and high streets, but Hoxton Analytics report that 35% of high street retail use analytics in building a profile of their customers, which, when compared to online retail where 90% of retailers use analytics to improve their business, the bricks are severely lagging behind the clicks.

With privacy concerns and GDPR compliance making it more difficult to gather accurate information, analytics firms are having to get creative when it comes to gleaning accurate data from footfall-monitoring technology.

As it has become trickier to understand the customer, solutions such as that from Hoxton Analytics, are providing that extra layer of knowledge to their clients, their latest technology allowing them, with a great deal of accuracy, to identify gender.

The people counting company's low-level cameras, which cover entrances up to 10m in width, are able to not only determine the direction a shopper is moving, but also to identify gender based on an algorithm that contemplates shoe size and footwear style (e.g. open-toe, high heel) and can go as far as identifying specific popular shoe brands, including Adidas, Nike, and New Balance. And importantly, by focusing on people's feet, shopper anonymity is maintained.

Hoxton Analytics, whose clients include CBRE, Savills and Manchester United, reports an accuracy rate of 95% in their camera's footfall counting, and 80% accuracy in the technology's ability to determine gender. This accuracy is by their consistent reviewing process, whereby it regularly takes ten 60-second segments of footfall data and footage from each camera every single day, and has a human cross-match it to ensure their algorithms are correct.

We spoke to Seb Ellson, business development manager at Hoxton Analytics, to find out how it has overcome the challenges of people counting in retail destinations.

TO GIVE A BIT OF BASIC BACKGROUND, WHAT IS FOOTFALL COUNTING, WHY DOES IT EXIST IN RETAIL DESTINATIONS, AND WHAT KIND OF INFORMATION DOES IT PROVIDE?

Ellson: “A retail destination’s footfall figures are some of the most important metrics that they have. Knowing and understanding how many visitors a shopping centre has each year is a huge factor in understanding the success of that centre and it’s also a really important tool to enable the management team and the landlord/owner to evaluate performance against previous, days/weeks/months/years. Shopping centre managers care about a lot of factors, footfall data is up there near the very top.”

“Footfall data generally gives an overview of the number of visitors to a centre, depending on the system this could be hourly, daily, weekly, monthly or yearly. More advanced systems analyse factors such as visitors ‘by entrance’, gender, and dwell time.”

THERE SEEM TO BE A LOAD OF DIFFERENT METHODS TO COUNT FOOTFALL TRAFFIC IN MALLS. WHAT ARE THE MOST COMMON FOOTFALL COUNTING TOOLS AND HOW ACCURATE ARE THEY?

Ellson: “The most popular methods are: BEAM [which are units installed at mall entrance and emits an infra-red beam, which registers a count whenever the beam is broken by someone passing through], mobile phone (wifi/Bluetooth), and facial recognition. The accuracy of each solution is very difficult to report, quite often there is no ‘ground truth’ and so when a provider reports footfall figures to a centre manager it’s a bit like marking their own homework.”

ARE SOME METHODS MORE ACCURATE THAN OTHERS? WHAT SPECIFIC INFORMATION CAN THEY GIVE?

Ellson: “Mobile phone data is generally the least accurate way of tracking footfall. Phone manufacturers are making it much harder to track the phones and with so many devices being carried (phones, smart watches, tablets etc) and the fact that young children will often not be carrying a device, the ability accurately report basic numbers is not possible. Camera based solutions are generally the most accurate because footage naturally exists that can be checked and audited.”

ARE THESE METHODS GDPR COMPLIANT?

Ellson: “GDPR and accuracy are heavily linked when it comes to footfall counting solutions. As previously stated, camera based solutions are typically the most accurate because they offer the ability to audit footage where necessary, however, the footage must be carefully managed and must meet very strict regulations to ensure it doesn’t fall foul of GDPR. If any ‘identifiable information’ appears in the footage then that footage must not be taken off-site, it must be kept securely, viewed securely and destroyed in the right way - if this doesn’t happen, the penalties are very severe. Now consider that somebody’s face counts as identifiable information.

“Hoxton Analytics uses cameras to count footfall at floor level, the cameras view between knee level and floor level and so deliberately never see any identifiable information. Hoxton then takes and manually count ten 60 second clips from each camera, every single day. These clips are from between the hours of opening. This enables Hoxton to ensure the accuracy of their reporting every single day.”

WHAT CAN RETAIL DESTINATION MANAGERS DO WITH THIS DATA?

Ellson: “As previously mentioned, footfall data is important to retail destinations as it informs so many factors. The success of events and other initiatives, use of the centre by time of day and day of the week, which entrances are used for entering/exiting the centre, store positioning, event positioning, kiosk positioning, staffing levels, security levels, insurances required, retailer mix, opening hours, car park hours etc.”

“Multi-million pound decisions are regularly made using data including footfall data. New retailers make a decision to sign a lease to operate from the centre based heavily on the footfall of that centre, retailer staff their stores based on this data, they select the mix of products/services based partly on the data.”

WHAT WOULD YOU SAY IS THE BOTTOM LINE ON WHY DATA NEEDS TO BE ACCURATE?

Ellson: “Data must be accurate in order that it can be meaningful. It’s unacceptable for a provider to report data that they can’t prove is accurate and retail destinations must be questioning the data, challenging the supplier and holding that technology or supplier to account.”





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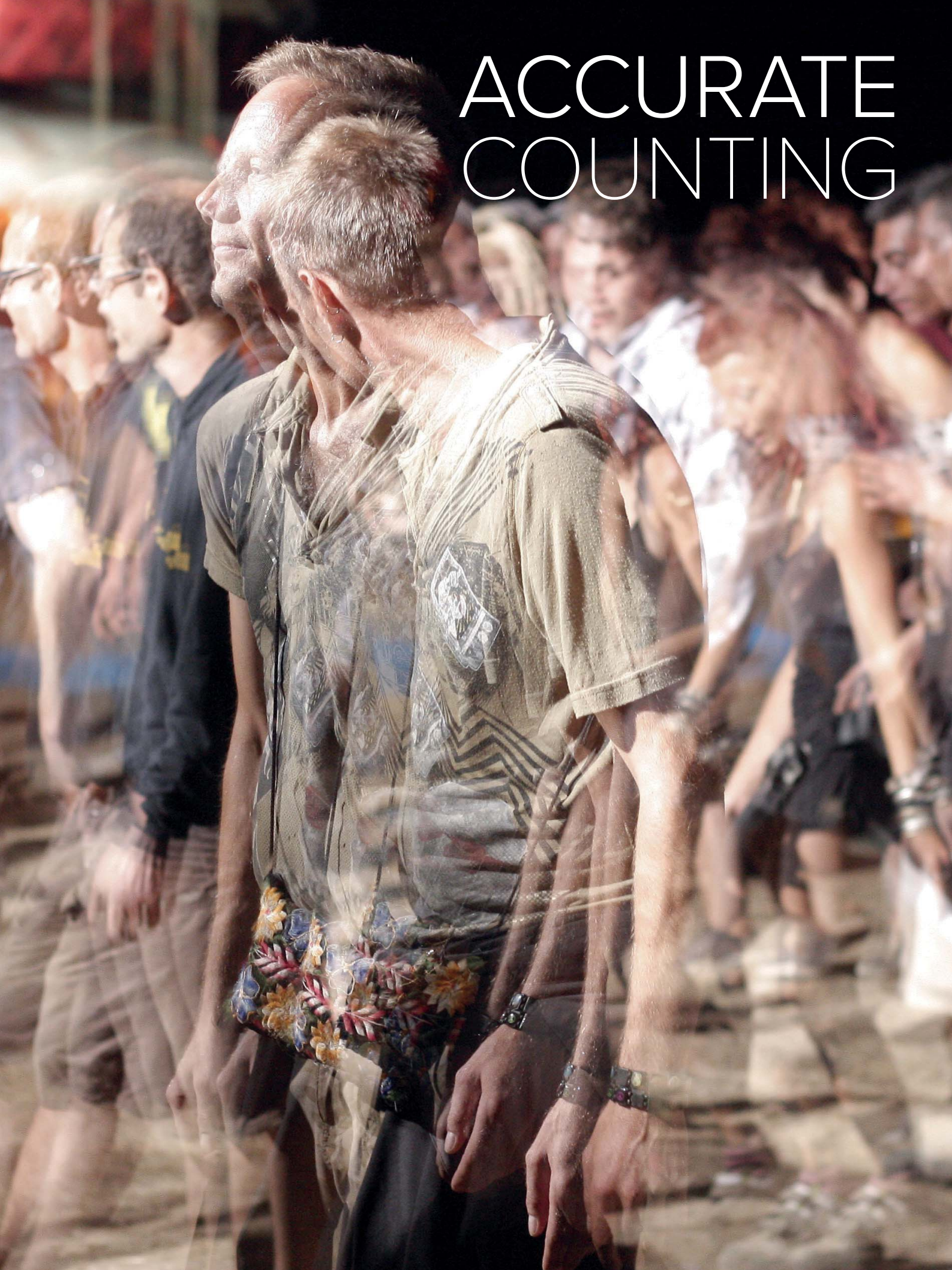


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ACCURATE COUNTING



New sensor filters employees from footfall counting

Gathering footfall data that is representative of the number of consumers that enter a retail destination is hugely beneficial for mall landlords for a plethora of reasons, but in complying with data protection and general privacy laws, it can be difficult to collect accurate and informative data. Is that person a new or a repeat visitor? What's their demographic? Are they going to buy anything? Are they just here to use the bathrooms? Are they an employee in the centre?

An answer to the latter question looks to be solved by FLIR systems Brickstream counting sensor, which is able to filter the employees from the consumers and provide improved sales conversion data accuracy and reliability for shopping centres.

The latest generation, called the Brickstream 3D Gen 2 people counting sensor, includes an employee filtering feature designed to provide retail and shopping businesses with more accurate customer traffic data and sales conversion metrics. The filtering feature uses a combination of Bluetooth Low Energy (BLE) technology and employee-worn tags to automatically identify and remove staff from customer counts, a process that can otherwise be manual or missing in retail environments today.

“The FLIR Brickstream 3D Gen 2 with Employee Filtering technology is designed to integrate with a retailer's analytics software to improve data accuracy and provide true metrics to inform decisions impacting retail operational efficiency, such as staffing needs, sale conversion rates, and other customer behaviour insights that are key to their success,” said Serge Goldenberg, general manager of the Integrated Imaging Solutions Division at FLIR. “Equipping retailers with an

automated and discrete employee filtering solution solves a problem for those working to collect data insights.”

Retail footfall measuring devices are primarily located above store entrances. But this can be an issue when, for example, greeters or security guards positioned at or near entrances may impact footfall by triggering the sensor. The Brickstream technology can be positioned above busy entrances, and are ideal for these environments where staff are located near doorways or where they frequently enter and exit.

Being able to distinguish customers from employees is also likely to prove useful for the likes of luxury or specialist retailers where foot traffic is lower where including even a few employee counts can easily skew conversion metrics. It could also prove helpful for retailers who set store targets based on the footfall traffic on a day to day basis to manage sales expectations.

The employee filtering feature is enabled through a small, easily concealed BLE tag worn by employees and registered to the sensor. The sensor automatically identifies staff when entering or leaving the store without any manual action required.

With its combination of BLE tag sensor technology, the Brickstream employee filtering feature reliably identifies staff members. Retailers access the counts either directly using the FLIR Brickstream user interface, or through integration with their retail analytics software.

It is a small, but significant step in the people counting technology which will pave the way for providing increasingly accurate footfall data which can be utilised by managers to share with retailers in order to tweak and improve the mall offering.



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WESTFIELD LONDON LAUNCHES FIRST EVER AI POWERED STORE

Westfield London has trialled the UK's first ever Trending Store, an AI powered fashion boutique of the future. The store opened from the 3rd to 7th July, stocking fashion-forward looks based on what's trending across social media in real time.

As the worlds of online and offline retail blend and inspire each other further, Unibail-Rodamco-Westfield - via its How We Shop research platform – took a look into the future with this one-of-a-kind concept. The Trending Store brought together the smart trending intel of online shopping and fashion influence with the 'IRL' human interaction of traditional shopping, for the very first time.

Unibail-Rodamco-Westfield partnered with AI trend experts Nextatlas to create the store. Via the power of machine learning, Nextatlas is able to predict the biggest breaking trends before they happen by monitoring over 3bn data points from 'trend hunters' globally by analysing both visual and text content from social media sources.

This trend data was then fed into a team of stylists, who sourced items on demand from retailers in Westfield London including Topshop, Reiss, Whistles, Lindex and Stuart Weitzman to house within the futuristic Trending Store space. Each of the trends was presented through mood boards and insights on Ultra HD screens.

Mario Coletti, managing director at Nextatlas said: "This is the first time we've used our data in a physical setting and so it's amazing to see how the platform came to life at The Trending Store. It's a pioneering way to demonstrate how AI will be relevant in physical retail for years to come. Our platform monitors trend creators, analysing visual content, hash tags and captions on a daily basis to project the trends of the future."

Myf Ryan, CMO Europe and group director of brand and strategic marketing for Unibail-Rodamco-Westfield added: "At Westfield centres we aim to bring the newest concepts, first to the market brands and best experiences to our customers. Through our How We Shop Research platform we know that shoppers increasingly want to experience both online and offline retail in seamless journey. Shoppers are inspired by online influencers and used to being guided by AI when they shop online, with products served to them based on their behaviour. Usually this guidance does not translate to a physical retail space, that is until now. Working with data analysts, NextAtlas, we are able to bring our shoppers products that are trending in real time - a true reflection of social conversation brought to life in a physical space. We believe The Trending Store represents the way we will all be shopping in the future."

All proceeds from the store went to Save the Children, Westfield London's charity partner. The store also featured a "Tending Vending Prize Machine" where customers could tap to donate £5/£10/£20 to Save the Children in return for a top trending prize valued up to £100.



INTU CENTRES CERTIFIED FOR CHILD-FRIENDLY WIFI

Intu has become the UK's first shopping centre owner to be certified as having child-friendly wifi at its national portfolio of popular shopping destinations. The certification means that the free wifi provided at intu's 14 centres across the UK, which are some of the largest and most popular in the country, has been proven to filter out inappropriate content. It has been awarded by Friendly WiFi, the government-initiated safe certification standard for public wifi.

Intu was the first shopping centre landlord to introduce free customer wifi in 2013. This has led to a succession of in-centre digital experiences as part of intu's drive to create compelling customer experiences and introduce more game-changing technologies to the retail sector, such as augmented reality experiences, wifi operated video games and queue jumping apps.

Roger Binks, customer experience director at intu, said: "intu's centres are some of the UK's most popular family day out destinations with 35 million customers and more than 400 million customers visits a year so we take the online safety of our customers very seriously as this certification shows.

"We hope that our decision to become Friendly Wifi certified encourages other landlords and retailers to follow our



lead in ensuring online safety for all shoppers across the UK.”

Friendly WiFi was launched by the government to ensure public wifi meets minimum filtering standards, particularly in those areas where children are present. Venues displaying the Friendly WiFi symbol have wifi filters which deny access to pornography and webpages known by the Internet Watch Foundation to host indecent images of children and advertisements or links to such content.

Beverley Smith, director of Friendly WiFi said: “Shopping centres are hubs for the young through to the old and intu provide a great shopping and entertainment experience for all. They are increasingly important to communities as both shopping and leisure destinations and it is great to see intu take the steps to ensuring that their visitors are kept safe online and protected from inappropriate material.

“I applaud intu’s steps to making sure all of their centres are certified. I am looking forward to working with their teams to shout about their certification and to show their customers their online journey is safe in their hands.”

Intu will be displaying the Friendly WiFi symbol at its centres in the coming months.



BRANDS NEED STORES TO DRIVE ONLINE SALES

With debate raging about the future of the High Street, research by CACI has revealed the negative impact of closing stores on brands' online businesses.

According to the research, retailers that do not maintain a bricks and mortar store in a catchment alongside a transactional website typically experience 50% lower online sales compared to those retailers that do have a physical presence.

By analysing data collected via a UK wide survey of over 2,500 consumers, CACI has found sales are an average of 106% higher within a physical store's catchment, with the impact even greater in the electronics (154%), fashion (127%) and sportswear (124%) sectors. CACI has termed this uplift in sales the 'halo effect' of physical retailing.

Alex McCulloch, director of CACI Property Consulting Group, said: "The halo effect highlights two key points as the industry wrestles with how it evolves in the face of seismic shifts in consumer behaviour. Brands should carefully consider the unintended consequences of downsizing their portfolios. What might seem an effective way to reduce costs may also undermine the viability of the business due to the positive impact stores have on online sales."



16% OF UK SHOPS LIE EMPTY

According to figures released under the Freedom of Information Act, 15.9% of all shops and retail outlets in the UK now lie empty. The figures obtained by Duff & Phelps quantify the scale of the challenge facing the UK high street after one of the toughest trading periods since the 2008 recession.

Philip Duffy, managing director, restructuring advisory at Duff & Phelps, said: "Getting an accurate picture of the real health of the high street is difficult, but by using FOI, we managed to gain valuable insight into what local authorities are experiencing. With a total of 418 councils in the UK, our mean average indicates that the total number of retail units that now lie empty stands at 50,578, or an average of 121 empty retail units per council.

There were 319,000 retail businesses in 2018 according to the ONS. Given this figure, it is believed that the void rate now stands at 15.9% of the total.

Retail is one of the most important markets in the UK, with its economic output in 2017 equating to £92.8bn, employing some 2.8 million people and comprising of some 319,000 businesses. But 2018 turned into the "year of crisis" for the retail sector. In the first 100 days of 2018, some 18

mid- and large-sized retailers collapsed, impacting more jobs than in the entire year prior—this has appeared to be the trend in the first half of 2019.

It is estimated that business rates are the equivalent of 2.3% of overall business costs for a traditional bricks and mortar retailer, compared to just 0.6% for pure-play online retailers.

Duffy continued: "The impact on local government cannot be underestimated either. FOI also identified that 91% of UK local authorities are retail landlords in their own right. Empty units mean lost rental and business rates income, all at a time when many local authorities are reporting increased financial pressures.

He concluded: "The old financial model of the traditional bricks and mortar retailer—based on a high street or shopping centre built around them in the post war era—was centred on regular increases in sales and 25-year leases with upward rent reviews only. As a result, it has meant high rents and occupancy costs. This has blown apart as a result of both the discounters and the dramatic uptick in online sales. The remaining question is whether this picture continues throughout 2019 and if so, at what speed?" concluded Duffy.



CVAS DRIVE SWITCH TO MONTHLY RENTS

As the retail industry faces a well-documented rise in the number of operators undertaking company voluntary arrangements (CVAs), research from Savills gathered since January 2018 shows that almost a third of all units that enter into a CVA have switched to monthly rents, rather than seek rent reductions or planned closures.

Savills data shows that 30% of stores that have been impacted by a CVA, administration or liquidation have only switched to a monthly rent so far in the process. Conversely, 24% of affected units have been earmarked for closure, while 37% have sought rent reductions in some capacity.

Research from Savills into the impact of CVAs, administrations and liquidations on the retail market has found there has been a larger impact overall in the in-town sector in terms of the number of units affected (with a total of 2,683 units affected in comparison with 1,522 units out-

of-town). However, despite these high numbers, only 539 in-town stores have been earmarked for closure, representing just 0.5% of the in-town market as whole. Likewise, 527 stores are set to close out-of-town, representing only 1.3% of the entire out-of-town sector.

Sam Arrowsmith, associate director in the Savills research team, comments: "CVAs continue to dominate the current retail landscape, and it is interesting to see the split in terms of retailers opting for monthly rents, rent reductions or closures. Each option will impact landlords in different ways, as while monthly rents may seem the more favourable option, the process of collecting payments on a monthly basis will still have an effect on a landlords' cash flow."

Analysis from the real estate advisor has also found that within the out-of-town retail market, of the 527 store closures proposed for 2018/19,

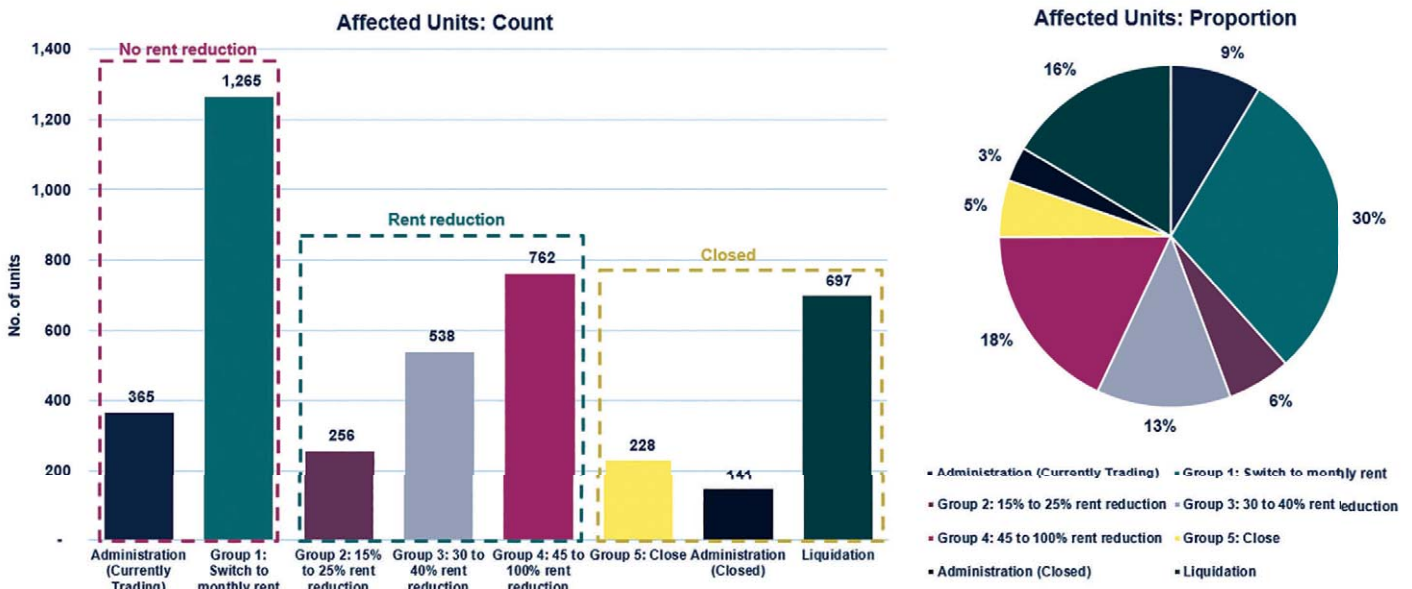
14% (74 stores) continue to remain open and trading with the same occupier. This is often due to the retailer having agreed new, more favourable terms with the landlord, or because the occupier is trading rent free and is likely to continue to do so until the landlord exercises the break to re-let the unit. Of those that have closed, 102 sites have already found a completely new occupier.

Dominic Rodbourne, out of town retail director at Savills said: "It is no secret that the retail market remains challenging, and whilst the number of stores impacted by CVAs, administrations and liquidations has grown, the number that are earmarked for closure represent only a very small proportion of the market as a whole.

"As the industry continues to be impacted by the challenges facing the sector, we can expect to see more retailers looking to reshape their estate whilst they work to adapt their business to meet the expectations of today's consumers."

CVAs, administrations and liquidations by Savills CVA categories

The number of stores that have switched to a monthly rent (and therefore seen no reduction in rental income for landlords) is higher than those that have closed either as part of a CVA, administration or liquidation (1,265 vs 1,066 respectively). Including the 365 stores currently in administration but still trading, 1,639 of affected units are still honouring their rental agreement. Nearly as many stores (1,566) have adopted some form of rent reduction since January 2018.



RETAIL ROCKS

Last month, Ellandi hosted its 8th annual Retail Rocks retail property conference. The event aims to discuss key current topics in retail property and to encourage a positive discourse around the sector (positivity being in short supply at the moment).

Isabelle Hease, Ellandi's head of research and analytics, kicked off with a talk on the state of the market with some key insights into the retail investment landscape. Shopping centre transactions have reached £577m so far this year with 14 assets traded, and it is the repurposing opportunities that were the most sought-after. It has again been local authorities that have been responsible for a sizeable chunk of all

shopping centre investments so far this year.

The lending market across all asset classes remains reasonably buoyant, with levels of financing issued remaining relatively similar for the last five years. Looking to the equity market, while retail property companies are offering relatively attractive dividends, the market sentiment is that this isn't particularly sustainable given falling rents, capex needs and increasing leverage. Shareholders are, understandably, much more pessimistic than fund managers, and no one really believes the published NAV's resulting in retail property companies currently trading at huge discount.

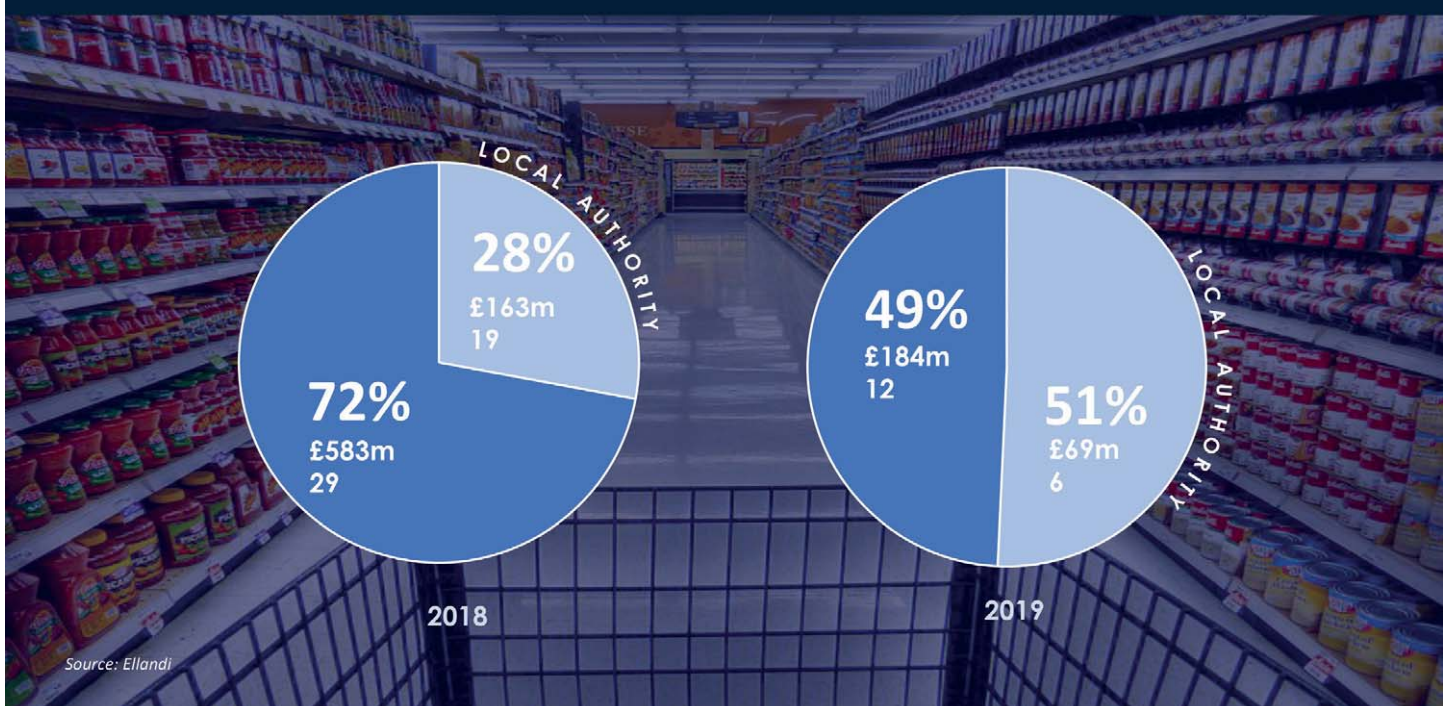
In the background, bank lending pressure is

increasing with borrower default more prevalent, and liquidity measures such as cash sweeps being employed. With 78% of all outstanding debt in the market due for repayment in the next five years, stats from deMontford University show that lenders have reduced their exposure to retail assets by 13% over the course of the last decade.

Looking to the occupier market, Hease confirmed that there continue to be some positive headlines in certain sectors of this market, with companies showing pre-tax profits and opening additional stores.

Hease concluded: "Yes, people are spending their money differently – there is a clear switch from

INVESTMENT MARKET – LOCAL AUTHORITY INVESTMENT



discretionary goods and ‘stuff’ to essential goods and services – but the UK consumer has held up pretty well, albeit they are now more selective. So for retail to perform occupiers need to reimagine how they operate and the products they offer.”

Next was a panel discussion with experts on investment talking through some of the key topics from Hease’s presentation.

Key conclusions were:

- The need for sharing data and how important it is for investors, retailers, analysts to use this to inform decisions going forward
- Positive markets such as factory outlets and retail parks have had a relatively steady performance and the market needs increased creativity from third party management and local authorities to find further opportunities within the market
- Looking at repurposing and regeneration of shopping centres and their towns: Residential is not always the ‘silver bullet’ and we are seeing a plethora of alternative use opportunities from offices, cinemas to laboratories, film studios and other creative hubs.

Aviva Investors’ Barry Fowler talked through the challenges facing institutional clients trying to create alternative products from existing assets and how much debt is available from lenders given the wider economy. Good relationships and clear business plans including transparent data from retailers opens doors to lenders according to Savills. He called for a change in dynamics between retailers and landlords to include greater visibility of data for valuations .

Laura Hurley from the Ministry of Communities, Housing and Local Government was next on stage and spoke about how the UK Government is helping the high street with its £675m Future High Streets Fund. She said the government is taking this seriously, changing policies but will need the private sector to get behind this too.

The second panel discussed a broad range of topics around town centre regeneration. Alteris’ Bert Broadhead asserted that the way retail is owned, operated and valued is ‘broken’ but this is where things start to get exciting

The FT’s Judith Evans confirmed that when the word ‘community’ is referenced in articles about

shopping and town centres in the Financial Times it generates a huge increase in number of readers. Therefore, when looking at retail potential it is important to home into what the community is engaging with, tapping into interest segmentation rather than demographic segmentation.

There is a need to explore how other retail arenas, for instance in the hotel, airport and exhibition industries are successful at the moment; they succeed because they connect into the life of a consumer – what role does a shopping centre play in their wider life?

What impact will shorter leases and extra costs involved in experiences in shopping centres play in investment in the future and what kind of income sources will there be?

Ellandi managing director and co-founder Morgan Garfield summed up: “We are delighted that once again Retail Rocks 2019 attracted a great audience with leading industry players participating on panels and voicing their views in lively discussions from the floor. People were honest in their views, there was acceptance of the challenges currently faced by retail but also a resolve to work collaboratively and creatively to try and find solutions,” he concluded.

INVESTMENT MARKET – SHOPPING CENTRE TRANSACTIONS



ALL IN THE MIX

Securing the future for retail property means embracing mixed-use, says Savills' *Stephen Toal*

Everyone knows that the global retail landscape is changing, and changing fast. Online shopping is transforming the way retailers use physical stores, as they convert more space to fulfilling click and collect orders and process online returns.

Retailers around the world are being disrupted and are having to adapt to suit changing consumer behaviour. The role of the old, boring and under-invested department store is largely redundant and landlords are having to adapt to the fact that they may not always have the retail occupiers to fill empty or surplus spaces.

However, what is encouraging, is the way many owners and developers are already looking creatively at repurposing and repositioning specific retail assets to meet the ever-changing demands of the communities in which they're based.

Often, multiple new uses are being incorporated into part or all of a redundant space, attracting new innovative occupiers, giving sites a totally new lease of life and – in many cases – creating exciting new places and destinations.

In London, for example, planning permission has been granted for the redevelopment of a traditional 1980/90s retail park on Old Kent Road

in Southwark into a desirable residential, retail and dining destination by Galliard Homes and Aviva Investors. The proposals include 1,200 new homes, restaurants, cinema, a new park and square, and – crucially – 15,800 sq m of new retail and office space. This will replace the former 'big box' units on site with retail spaces more suitable for the new ways we shop and which will meet the 'needs' of the development's forthcoming new residents.

Physical retail is not dead – there is still an audience for it and brands that innovate and offer convenience to the consumer continue to attract high footfall – it just is taking a different form.

It's therefore often not just a case of simply repurposing retail with a single uniform alternative use, such as residential homes, but of finding a solution that works in that individual location and for the local community, and is as future proof as possible.

This may include incorporating multiple uses, from the more traditional such as offices, hotels and gyms, to the more radical such as education facilities, film studios, retirement apartments and art galleries.

The key is to consider what mix is most suitable to the location and strike the appropriate balance.



Stephen Toal is head of property management research at Savills



MERRION CENTRE MAKES HISTORY

The Merrion Centre in Leeds has launched the first ever ‘Professor Humboldt’s Chamber of Time’ Museum; a unique shopping centre family attraction which will run throughout the school holidays until 1st September.

Operated by Bifrost Entertainment, seven professional actors, who have featured in films from Harry Potter, Love Actually and Finding Neverland, will whisk visitors through 5,000 years of British history from the mythical origins of Stonehenge through to the tournaments of the Tudor dynasty.

Working with Yorkshire based theming company Norse Sky and local lighting and sound company Sound

Leisure, they have totally transformed the 3,500-sq ft unit on the main mall of the Merrion Centre into Leeds’s first ever interactive time machine. Using state of the art set design and special effects the ‘Chamber of Time’ delivers a 45 minute totally immersive and action-packed educational encounter for all the family.

James Broughton, head of marketing & PR at the Merrion Centre, said: “The Chamber of Time is an immersive and educational experience, and we are sure it will prove a unique activity to keep the children entertained throughout the school holidays. We look forward to welcoming lots of budding time travellers to the centre, to not only learn about history but to become a part of it.”



The iconic bronze bull statue at Hammerson’s Bullring, Birmingham donned cricket kit to celebrate England’s win in the ICC Cricket World Cup. The dramatic Final at Lord’s followed England’s victory against Australia earlier in the week at the local Edgbaston Stadium.

JULY MOVES



CAPITAL & REGIONAL has appointed **ROBERT HADFIELD** as commercial director. Formerly Debenhams’ group property director he will be responsible for directing the leasing team, CML and temporary lettings.



WESTGROVE GROUP has recruited **ADRIAN CANALE** as business development director to drive continued expansion into the South. He previously worked for security specialist VSG and Carlisle Support Services.



HAMMERSON has appointed **HOWARD EBISON** as its new operations director. His most recent role at Manchester Airports Group led the retail and customer development of Manchester Airport’s £1bn transformation programme.



Grainger chief executive **HELEN GORDON** has become the president of the **BRITISH PROPERTY FEDERATION**. The BPF has appointed JLL’s EMEA chief executive Guy Grainger as its new junior vice-president.



MILLIGAN has appointed **STUART HARRIS** as chief operating officer. He was previously a co-founder and director of Queensberry Real Estate and brings over 25 years’ experience in the leasing and development of mixed-use schemes across the UK.



MULTI CORPORATION has appointed **PAT NASH** as managing director Ireland and United Kingdom. Before joining Multi as director of asset management in 2016, he was asset management director of Green Property, and managing director of the Irish division of BAM Property.



CUSHMAN & WAKEFIELD has made two leadership appointments within its UK business, naming **CANDICE MATTHEWS** as UK chief operating officer and **RICHARD PICKERING** as UK chief strategy officer.

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