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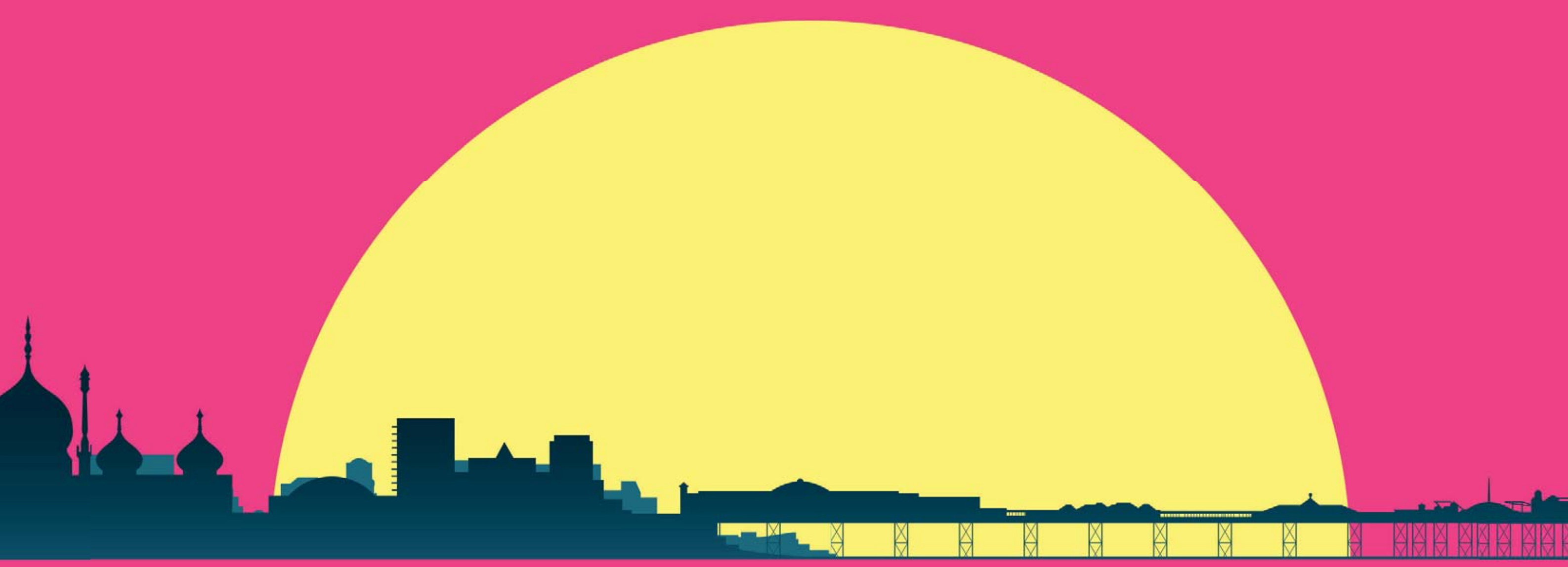
REVIEW ISSUE



The Beacons Highcross Leicester

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Jack Payne, Technical Services Manager, Highcross Leicester

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Editor's letter

Klepierre's bid for Hammerson, which would spell the end of the proposed takeover of intu, has once again thrown the spotlight on property valuations. Even though the French-based retail investor offered a 40 per cent premium to Hammerson's share price, the board was still able to reject it out of hand on the basis that it was still well below the book value of the company's assets.

So, there seems to be a massive disconnect between the way property investors value assets and the price stock market investors put on them. Bizarrely, those two groups of investors are in fact one and the same – ultimately they are pension funds, insurance companies and fund managers.

The problem is there's really no evidence for anyone to go on. There's not been a major shopping centre sold for two years now, and if values have fallen then there's very little reason for anyone to sell voluntarily and crystallise a loss. And with bad news from retailers coming week after week the incentive to sit tight only gets stronger.

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Shopping Centre is available on subscription. UK & Ireland £96; Overseas £150.

Shopping Centre is published monthly.

ISSN 0964-1793 | Printed by Stephens & George Ltd

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NewRiver wins in Basingstoke

NewRiver has been appointed by Basingstoke and Deane Borough Council as its nominated developer to bring forward the redevelopment of a 66-acre leisure park in a prominent location in Basingstoke close to junction 6 of the M3.

Capitalising on the growing popularity of integrated leisure and retail, NewRiver's proposals currently comprise 500,000 sq ft of leisure and 200,000 sq ft of designer outlet shopping. The developer said it is confident that this unique combination of leisure and outlet retail will appeal to the local community and a catchment significantly beyond Basingstoke in one of the UK's most affluent regions.

The council and NewRiver have entered into a long-term development agreement which is conditional on achieving planning consent and pre-lets as well as a viability assessment. In the event that the development agreement becomes unconditional, the council will grant NewRiver a 250- year leasehold interest.

NewRiver property director Allan Lockhart said: "Capitalising on the emerging trend of integrated leisure and retail, this exciting development is yet another example of NewRiver identifying an opportunity to create value from a site that offers significant unrealised potential through the creation of a truly unique leisure and retail destination."

BL launches supplier code of conduct

British Land will require all of its suppliers to promote safe and fair working conditions and the responsible management of social, ethical and environmental issues. The new code sets out supplier obligations in areas such as:

Social: health and safety, child labour, forced labour, working hours, payment, discrimination, freedom of association, right to collective bargaining, community engagement and apprenticeships.

Ethical: conflict of interest, anti-bribery and corruption, fraud and money laundering, whistleblowing and privacy.

Environmental: sourcing of materials, environmental management, air quality and waste management.

BL will encourage suppliers to take all reasonable endeavours to promote this code to their suppliers and subcontractors. While suppliers hold responsibility for compliance with the code, BL will require them to provide reasonable access to assess their performance where appropriate, for instance through third party audits.

Ginny Warr, head of procurement at British Land said, "Our new Supplier code of conduct supports our ongoing commitment to our suppliers to operate an open and collaborative working relationship in which all parties can thrive and grow."

EDEN WALK MOVES AHEAD IN KINGSTON

Kingston Council has pledged to use CPO powers to move British Land and USS's £400m regeneration of the Eden Walk shopping centre forward. The vision of is to redevelop the site with 420 homes, 28 retail units, 12 restaurants, a cinema and office space. The prime town centre site includes the existing Eden Walk shopping centre, multi-storey car park, Millennium House, Neville House and Gough House. The council granted planning permission in 2016 but BL and USS have been negotiating to complete site acquisition since 2013.

PRIMARK AND LIDL SIGN IN HARROW

RPMI Railpen has agreed deals with Primark and Lidl at St Anns shopping centre in Harrow. Primark is relocating its store within the centre to the former BHS store and will trade over 43,000 sq ft, while Lidl is opening a new 14,230-sq ft store in the ground floor of the existing Primark store, having signed a 25-year lease. GCW and Knight Frank advised the landlord and CBRE represented Primark.

KIDS CAVERN SIGNS AT METQUARTER

Queensberry has signed award-winning retailer, Kids Cavern, as the first major retail letting as part of its vision to reposition and refurbish Liverpool's Metquarter. Scheduled to open in September, Kids Cavern will occupy nearly 15,000 sq ft and is being billed as a department store specifically designed for kids. The deal forms a central part of the strategy to refocus the centre with high quality restaurant brands at the Victoria Street end and luxury retail concentrated on the lower level and the front of the centre. Everyman Cinemas has already signed as leisure anchor.


RetailReport
Monthly Report

NEXT TAKES EX-BHS METROCENTRE UNIT

Next has launched one of its biggest UK stores in the 78,000-sq ft former BHS unit at intu Metrocentre, more than doubling it space at the Gateshead mall. Another key Next store will open at intu Merry Hill in the West Midlands later this year following work to convert a Sainsbury's unit into a 75,680-sq ft store. Kate Grant, regional managing director at intu, said "This substantial upsizing at intu Metrocentre reflects the growing appreciation we're seeing among retailers for the best physical stores in the right locations."

QUINTAIN UNVEILS NEW WEMBLEY RETAIL PLAN

Quintain has unveiled an ambitious vision for the retail element of its £3bn Wembley Park transformation. A total of 500,000 sq ft of retail and leisure will be provided, including 240,000 sq ft of new build, alongside 633,000 sq ft of Grade A office space and 7,000 new homes for 20,000 full-time residents when fully completed in 2027. The majority of the retail and leisure will be completed in 2020, with over 40 new shops, restaurants and services complementing the existing offer at London Designer Outlet and in addition to the previously annouced Boxpark.

OAKTREE BUYS TALLAGHT

Oaktree is reported to have paid €250m for a 90 per cent stake in 27-year-old The Square shopping centre at Tallaght, south Dublin which attracted 22m visitors in 2017 with a rent roll of €14m. The purchase of separate interests from Indego and bad bank Nama finally unlocks the opportunity to refurbish and extend the centre which currently extends to 570,000 sq ft with 19 acres of surface parking. Current anchors include Tesco, Debenhams, H&M and River Island.

Eataly arrives in the UK

Eataly, the Italian marketplace, is to open its first UK location at British Land's Broadgate in the City of London. Eataly has signed for 42,000 sq ft of ground and first floor space.

Eataly has become a global phenomenon with one very simple idea: to gather all the high-quality Italian foods under one roof, where you can eat, shop and learn. With a selection of the best Italian products, restaurants, bars, quick services, exciting on-site production laboratories, and a cooking school, Eataly will add to the already popular restaurant and bar offering at Broadgate.

The letting marks yet another positive step in Broadgate's evolution into a mixed-use neighbourhood for London, and sets the tone for the world class retail destination that British Land is delivering at the campus.

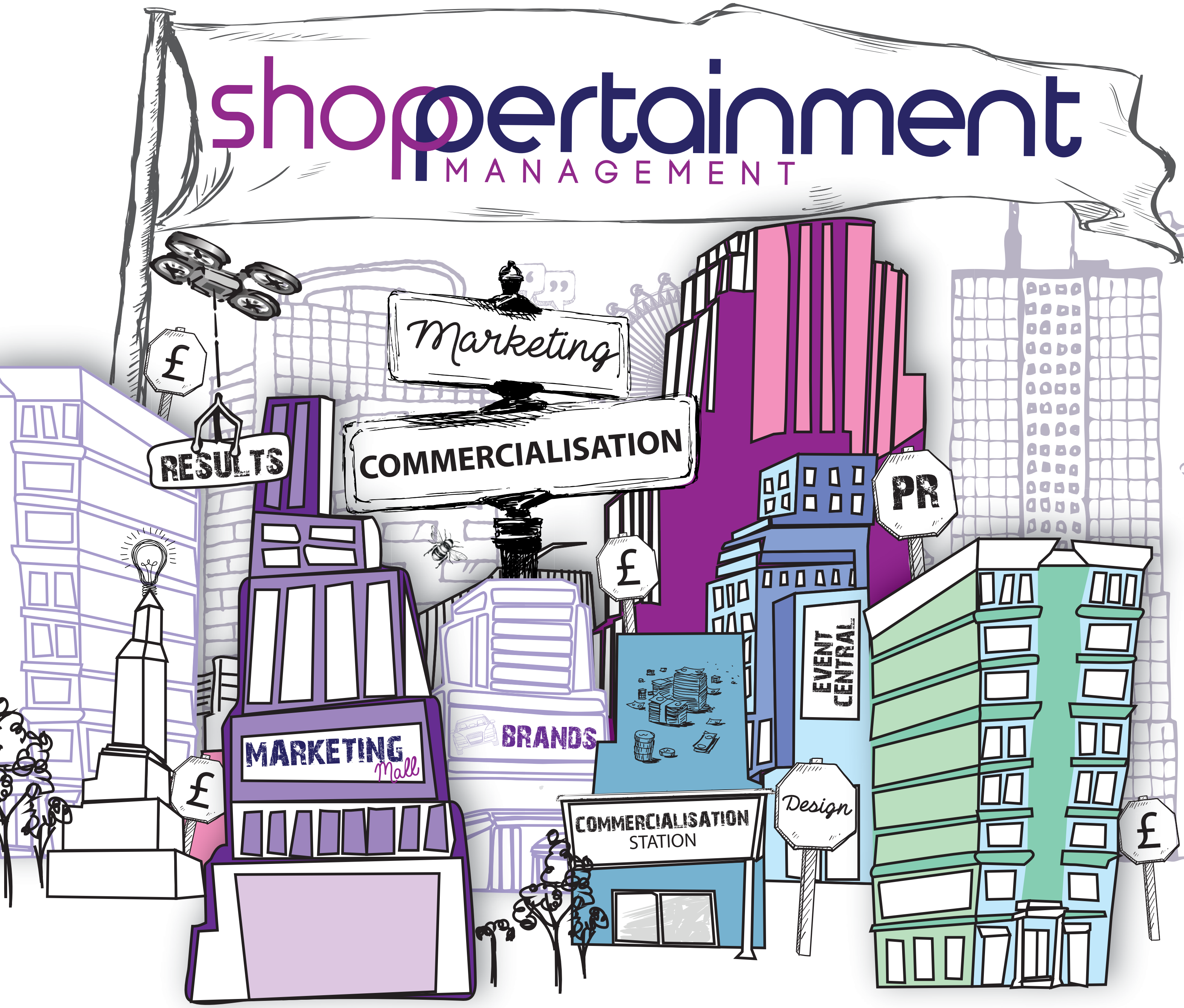
Eataly's marketplace will be accessible from both Bishopsgate and Broadgate's Exchange Square which is due to be transformed into a new park for the campus. These additional entrances will significantly improve the campus' permeability and its connections with the lively surrounding areas of Spitalfields and Shoreditch.

Tunsgate Quarter 85 per cent let

Queensberry has opened its revamped Tunsgate Quarter in Guildford following a comprehensive 18-month refurbishment programme to remodel and extend the centre. The 80,000-sq ft retail and leisure development has attracted a number of premium lifestyle brands including OKA, The White Company, Loaf, Bobbi Brown, Nespresso, Pho, lululemon and Cath Kidston. The Ivy Castle View is due to open in April.

Post opening, Queensberry signed Cosy Club and Seasalt, both new to Surrey, taking the scheme to 85 per cent let.

Casual dining operator Cosy Club has signed to open a 7,935-sq ft restaurant featuring a new balcony, overlooking Guildford's High Street and Clock Tower. And Seasalt, the Cornwall-based clothing, homeware and accessories retailer, has signed up for a 1,370-sq ft unit.



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BATTERSEA TURBINE HALLS UNVEILED

With a new underground line under construction, millions of people will be able to visit the Power Station once it reopens and is brought back to life in 2020. They will be greeted by a wide range of shops planned as well as a food hall that will provide local visitors, residents, tourists, shoppers and workers with a huge variety of places to eat, drink, engage and interact.

The two turbine halls will house the vast array of carefully curated brands from around the world in just over a hundred units. Apple, one of the most famous brands in the world, has already pre-let 500,000 sq ft of offices within the building for its European headquarters.

Turbine Hall A, which was built in the 1930s and evokes the lavish Art Deco glamour of its era, will be home to the Premium Collection, brands that portray elegance, sophistication and timeless style while Turbine Hall B, completed in the 1950s, has a sparer aesthetic and will bring together contemporary brands providing an eclectic mix of younger, faster and more diverse names.

The Power Station will not just be visited by shoppers, but the area is already becoming one of London's most exciting new food and drink destinations. Visitors will also come to see the Power Station itself – it has been a huge attraction on Open House days already – to ride the chimney lift for amazing London views, to see the remarkable A and B Control Rooms and to do business at the Apple offices in the Power Station or the new US Embassy nearby.

Simon Murphy, deputy CEO and CFO of Battersea Power Station Development Company, said: "The retail offering here will form a key part of a new London destination we are creating at Battersea Power Station. Locals and those from across Britain and the world will be coming here for all sorts of reasons, including being able to go into one of the world's most recognisable buildings."

Battersea Power Station Development Company has launched London's newest retail and leisure destination, with 700,000 sq ft of retail and leisure in one of the world's most iconic buildings.

Retail leasing director Sam Cotton, at Battersea Power Station Development Company, said: "We are creating something very special here that will stand alone in the retail world. We will be giving consumers access to both well-known brands, who will be offering something different to what they have elsewhere, as well as great start-ups from Britain and around the world.

"The response we have already had from businesses has been incredible and as we are handpicking every single retailer, this is going to be a fantastic place for both retailers and consumers. We are scouring the globe, not only for the best retailers but also looking at how we can provide a platform for the wider evolution of retail."

Helen Carr, F&B leasing director at Battersea Power Station Development Company, said: "Food lovers, chefs and restaurateurs from all over the world have their eyes on the Power Station as it emerges as a new food destination and we are in a great position to attract the best of this home grown talent and global cuisines.

"We will have a 35,000 sq ft food hall showcasing innovative dining experiences that combine the best of London's vibrant food scene, including the latest restaurant start-ups, new concepts, and international cuisines. It will be a place to discover emerging talent, alongside established chefs, and a chance to sample the latest food trends or enjoy old favourites."

CWM is letting agent.

WESTFIELD EXTENSION OPENS

Opening of 740,000-sq ft extension makes Westfield London Europe's biggest shopping centre

Westfield has opened the first phase of its £600m expansion, six months ahead of schedule. Anchored by John Lewis, new store openings include Adidas, H&M, West Elm, Currys PC World, Boots, Space NK, Mango and The White Company.

On completion the extension will house more than 90 new shops, cafes, restaurants and leisure outlets taking Westfield London to 2.6m sq ft and making it the largest shopping centre in Europe.

First to open was a new state-of-the-art John Lewis full-line department store over four levels and 230,000 sq ft. Since Westfield London opened in in 2008, John Lewis has consistently been the most requested retailer in shopper surveys.

New fashion retailers joining the expansion include Primark, which is opening a 70,000-sq ft store, Chinese brand Urban Revivo opening its first store outside Asia, along with Boden, Bravissimo, Stradivarius, Frencheye, Emperor and Charles Tyrwhitt.

As well as strengthening its homewares offer with West Elm, Bo Concept, DFS and Raft, Westfield London will also be adding to its health and beauty proposition with Space. NK, Urban Decay, a new Boots, expanded Lush and new stores from Molton Brown, Miller Harris, Penhaligons and Blink Brow Bar. A brand new fitness concept, FirstLight Cycle, will also open and will become the UK's largest boutique cycling offering.

A number of brands including H&M, The White Company, Monsoon, Mango, Guess, Ugg, Cath Kidston, Pull & Bear and Bershka are taking advantage of the expansion to launch bigger and enhanced stores at Westfield London.

A new dedicated outdoor events space, Westfield Square, with its own access from Wood Lane and White City tube stations, will provide a major focus on dining, entertainment and experience and will go live in Summer 2018. Operators such as Europe's largest Japanese food hall Ichiba, All Star Lanes, Puttshack and new restaurant and bar concept, Maple, will open throughout 2018.

As part of the expansion, Westfield London will deliver 1,500 new homes including affordable homes – of which 89 will be completed by Summer 2018. Westfield will also deliver 45,000 sq ft of offices space and will include Westfield's new European headquarters.

Peter Miller, COO of Westfield Europe, said that following the successful opening in 2008, Westfield has been master planning this expansion to connect with and stimulate the broader White City regeneration.

He said: "The further investment ahead of the centre's tenth anniversary year is testimony to the strength of Westfield London which experiences high retail demand for space from luxury and high street brands looking to house their flagship stores, along with first-to-market dining and leisure concepts.

"Westfield London has introduced a number of UK centre firsts including the first luxury precinct, new hotel concierge services, an expanded dining offer as well as hosting major international events and film premieres. It is now time to build on that success with the opening of the expansion."

Westfield London is a 50:50 joint venture between Westfield and German fund Commerz Real, a subsidiary of Commerzbank, and board member Roland Holschuh said: "Since its opening in 2008, Westfield London has displayed an outstanding performance, and now we are writing a further chapter in this success story together with Westfield. The extensive further development of the centre takes into account the high level of demand from current and future retailers. Great Britain, and in particular London, remains an important European market for us."

THE IRISH OUTLOOK

Ireland remains stable after recovery

For the fourth consecutive year, Ireland's economic growth has outperformed that of other countries across Europe, according to research from CBRE and Savills. Ireland saw 5.8 per cent economic growth year on year in 2017, almost three times the 2 per cent being experiences across the EU as a whole.

Consumer spending remains strong against this healthy economic backdrop, however the Sterling exchange rate and online sales are putting pressure on the industry. Enda Luddy, managing director at CBRE Ireland, reports that: "Concerns about the ever-increasing move to online platforms and leakage to Northern Ireland as a result of the Sterling-Euro exchange rate proved a lingering concern for some investors in the retail sector of the economy in 2017."

As a result, many investors and indeed occupiers focussed their attention on a smaller number of the better performing high streets, shopping centres and retail parks. The CBRE report predicts that there will be rental growth in the most sought-after streets and schemes, but rents will remain relatively flat elsewhere during 2018 as the sector reacts to structural changes.

The CBRE report says that although undertones of negativity appeared in commentary about the retail sector and property market in 2017, the reality is that the sector performed well last year with consumer sentiment, retail sales and footfall all broadly positive.

Ireland saw continued strong demand for stores on the best retail high streets, shopping centres and retail parks throughout the country. Transactional activity in 2017 largely emanated from a relatively small pool of retailers,

but there were several notable transactions negotiated with new entrants to the Irish market such as Hotel Chocolat, Victoria's Secret, The Range, Homesense, Smiggle, Dr Martens, Urban Decay and The Ivy.

Deflation remains a consistent theme in Irish retail, with three-in-four sectors registering lower average prices throughout 2017, according to Savills Ireland's market review. This mirrors both the ongoing compositional shift towards mid-market and value brands as well as the level to which retailers must strive towards in order to maintain market share in what is a competitive environment.

Luddy says that a scarcity of premises in the most highly sought-after locations is likely to continue to frustrate retailers in 2018. "However," he says, "there are now signs of new retail supply coming on stream, both in terms of new development commencing and new planning applications being lodged, which will help alleviate this pressure In line with trends elsewhere in Europe. We are continuing to see existing shopping centres expanding their footprint.

"Most are adding accommodation such as a tailored food & beverage offer and a more diverse range of leisure as well as focussing on placemaking to increase dwell times and boost footfall."

Centres across Ireland are all looking to expand in order to increase their retail, F&B and leisure offerings. Blanchardstown shopping centre in west Dublin has recently been granted permission for a €40m redevelopment and extension of its Red Mall. This will add 9,300 sq m of retail space. Permission is also in place for a 5,575-sq m extension to its Central Mall.

After recently completing a 16,000-sq m extension, Liffey Valley shopping centre is seeking permission for a further 2,500 sq m of retail and restaurant space. A decision is due early next year.

Elsewhere, the Square shopping centre in Tallaght – which is currently under offer – has planning in place for a new anchor store and 12 new units. Frascati shopping centre in Blackrock is undergoing a substantial redevelopment which will see the centre's footprint almost double in size from around 9,000 to 16,000 sq m. Across the road, Blackrock shopping centre has received the green light for a €10m upgrade.

Several planning applications for new retail schemes are due to be lodged in 2018 including a scheme in Carrickmines in south Dublin. This follows planning for a scheme in Cherrywood was lodged last year. In addition, there may be some movement on the Clery's redevelopment on O'Connell Street in Dublin later this year. Outside of the capital, there is limited new retail supply planned.

Retailers continue to focus on establishing flagship stores in key schemes and high streets. Dublin is now firmly on the radar of many international retailers looking to grow their portfolio in Europe while Irish retailers are also increasingly active.

"Competitive tension for stores on some of the better performing high streets, shopping centres and retail parks, where vacancy is negligible, will see further retail rental growth being achieved," Luddy predicts. "With retailers increasingly focussing attention on a relatively small pool of core locations and schemes, we expect to see an increase in rental growth in the most sought-after streets and schemes but remaining relatively flat elsewhere during 2018.

"It will be increasingly necessary to evaluate secondary and provincial properties on their own merits as opposed to collectively from this point forward. The need for astute asset management will really come to the fore this year with rental growth likely to prove elusive in schemes that are not being managed optimally.

"We expect to see break options in leases continuing to move out over the course of the next 12 months with landlords seeking longer term certain leases and reducing incentives for prime units."

Recent years have seen many Irish retailers focussing huge attention on improving their multichannel strategies which looks set to become increasingly important. Those that have yet to embrace omnichannel may face some struggle.

The CBRE report says that the physical store and its relationship to the consumer will continue to be hugely topical in 2018 with physical stores becoming increasingly focused on consumer experience and an increasing proportion of consumers opting to shop online in addition to shopping in-store. The logistics sector will become increasingly important as the role of the traditional store changes leading to further blurring of the lines between retail and industrial property over the next few years.

"Dublin is now firmly on the radar of many international retailers looking to grow their portfolio in Europe while Irish retailers are also increasingly active," Luddy concludes.

SCMC | SHOPPING CENTRE MANAGEMENT CONFERENCE

A LOOK BACK AT TWO PACKED DAYS IN BRIGHTON

More than 500 delegates from all corners of the UK and all aspects of the retail property management profession gathered at the Hilton Metropole in Brighton.

The packed conference programme saw debate and discussion about the big issues facing retail property, while the exhibition floor showcased the latest products and services from the industry's top suppliers.

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THE ECONOMIC OUTLOOK

Tanya Beckett, BBC World News' business presenter kicked off proceeding with an overview of the UK economy and politics.

Setting the scene, BBC World News' business presenter Tanya Beckett, who also chaired the panel sessions for the day, opened the conference with her insights into the UK economy, political climate, and predictions for the coming years in the retail world.

Top of Beckett's agenda was to establish the increasing irrelevance of economics on the UK's economy, saying that this was indicative of the challenges going on in our time. She said that overshadowing the current economic climate is the omnipresent loom of Brexit, which she called "a very confusing bump in the road" that is indicative of a larger change on the horizon.

She said: "It's symptomatic of people thinking in a different way about what they have, what they might have, and what they consider to be fair. It's also, probably, the start of us rethinking capitalism and trying to redistribute wealth in a different way, and the pressure to do that is very great, and that's a positive thing."

Beckett addressed how the economy is currently faring in the face of continual uncertainty as to the how the next few years will unfold. She mentioned the impact of the fishing industry and how regulations were having a negative impact on Scotland, but rather than focusing on its failings, she shrugged it off as not being a blueprint of things to come.

In spite of various concerns, she remained confident that the interests of the UK people are at the heart of Brexit and the governmental aim is to create an optimum trade environment, saying: "These problems will be resolved. They are not problems that will be allowed going forward."

When exactly these solutions will transpire, she said, is indicative of how the UK government decides to direct their immediate focus, as within political movement, progress is often slow. She observed that there is a tendency to push towards an instantly gratifying solution, and benefits of a trade deal isn't necessarily fitting with the short-term goals of the government.

Beckett moved on to talk about rising interest rates, saying they don't relate to the actual needs of the economy. One of the greatest pitfalls to the period, she said, is the creation of a generation being lulled into a false sense of security at a time when interest rates are low, when the reality is that sometime in the future this is going to change.

She then discussed the resurgence of behavioural economics and how more focus should be given here than to the data where so much of the focus lies, saying: "It's a matter of understanding the mood of the country and what people are going to be doing next on a personal level."

Closing her address, Beckett turned to retail and its future, referencing a rise in technology and a shift in international fashion. Retail buzzword AI (artificial intelligence) remains full of potential, with interactive changing rooms and the like still looking like a genuine prospect albeit someway down the road. She also highlighted the beginning of the rise of Chinese fashion, saying that with the impact of Brexit this could look to see a huge leap.

And finally, leading into the first panel of the day she posed the question: "what should shopping centres look like?"


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THE POWER OF PLACEMAKING

A panel looked at one of the most over-used buzzwords in property, but one which reflects the changing nature of retail destinations

Tim Keeping, who is chair of Southampton BID as well as centre manager at the city's Marlands shopping centre, set the scene. "Good placemaking is about seeing a region, city or town as a destination in its own right," he said. "Take Disneyworld as an example. It's made up of separate zones but it's greater than the sum of its parts. And in a shopping centre you get more for your money by being with like-minded people."

BNP Paribas Real Estate's director of special projects & placemaking, Denizer Ibrahim, said: "The spacial implications of the change we've been going through is that the hermetically sealed cookie-cutter boxes that landed in town centres no longer meet consumers' demands in terms of how they're designed or curated."

He said shopping centre operators need to move from from being librarians to being editors. "A librarian keeps things in order, but an editor's role is more creative," he said.

As an example of this approach, the panel looked at the wave of change sweeping through the south London suburb of Croydon. Matt Sims, chief executive of the Croydon BID, said: "Croydon is starting to wake up, and it's not just down to Westfield. There are 30 other development sites under way as well," he said. "They all have their own ambitions, aims, needs, wants and we can only meet those through a collaborative approach. Westfield can't achieve its aims on its own, and neither can the council. BIDS bring together this collaborative approach – bringing parties together to say what we believe a place should look like."

Ibrahim asked: "As a born and bred Croydon boy, I'd like to know how does Croydon define the 'soft stuff.' You can have a massive shopping centre and massive resi buildings but they won't define the place, it's the soft stuff and public realm, education and culture, that will do that.

"Kings Cross is a case in point. Without Central St Martins it would have been just another regeneration scheme, but landing thousands of creatives there transformed it. How can Croydon achieve that?"

Sims said the arrival of Boxpark was a key sign of change. "Boxpark a great development, but it's not the only development," he said. "It's given us an insight into what can be done, abut also what might not be done going forward.

"The issue is that everyone has differing visions. Westfield's all about Whitgift and Centrale; the council has a different vision and the BID yet another. We've now hit the point where we must bring those together with an aligned vision of what should happen. That's happening."

And he concluded: "Croydon's one of the most diverse boroughs, and that's an asset. It's very independent, very different and it should play on that going forward."

So what are the lessons for other locations? "Local authorities are absolutely key to this," said Keeping. "BIDs and local authorities have to work hand in glove." But Sims warned: "BIDs have to remain private and independent. The services we deliver are so closely aligned with the wider city that have to be very careful – we can't deliver services on behalf of the council."

Samantha Sen, head of policy and campaigns at Revo, said retail owners and managers were in a unique position to influence placemaking. "The opportunity for retail property and placemaking is that you have the inside track onto your community and what they desire. Online can never deliver that."

THE PURPLE POUND

A lively panel focused on the £249bn commercial opportunity held by the disabled UK's disabled population.

In the UK, there are six million people with a disability. Their collective spending power amounts to £249bn. And yet the bulk of the potential spending pot remains untapped. The panel, helmed by government retail sector champion Helen Drury and made up of Purple chief executive Mike Adams, St Stephens Hull centre manager Jim Harris, Workman partner Robin Howland and Freeney Williams CEO Rick Williams, discussed how centre can tap into this potential.

The underlying issue for most centres was summed up as that they are accessible, but not as accessible as they could be. Howland opened the discussion by picking up on how we understand disability, hammering home that 80 per cent of disabilities are invisible, and a lack of understanding and recognition of this is one of the biggest barriers to disabled customer retention. He said: "as a society we have made small steps towards improving the understanding and perception, but we've still got a long way to go. There needs to be more training and more feedback from disabled groups."

Harris called for a proactive, communicative approach to the barriers faced by disabled shoppers, explaining how his Hull centre addressed the issues at hand. He told of how they r met with a regular disabled shopper, and went with him on an end-to-end shopping trip, from car park to individual retailers to toilet facilities in search of issues.

He said that by undertaking this hands-on approach his team had been able to identify the less obvious barriers facing disabled customers: "As much as we are DDA compliant, we add bits and pieces on like restaurants or different levels and getting him to go around and say 'this doesn't work' or 'this works well' gave us some real perspective on what we could improve upon."

When the talk of Changing Places toilet facilities came up, Williams fielded the topic putting it simply that you don't want to be taken to court for not having one, and that whilst they are expensive, attributing the lack of one to price is "a difficult argument to sustain over time."

Mike Adams, chief executive at disability charity Purple, called out the retail industry for sleeping on the £249bn of disposable spending posed by the disabled community, saying that disabled people have one of the highest reported loyalties to brands but that only 10 per cent of businesses currently have a targeted strategy to tap into the disabled market.

One of the big issues Adams raised was retail staff, citing a recent shopping trip where in 23 out of the 27 retailers he visited, nobody approached him in spite of his visible disability. And when someone did approach, they addressed his partner rather than him. He said: "It is the fear of unintentionally offending a disabled person that causes front-line customer staff to think twice or three times about approaching a disabled person because they don't understand the etiquette or the language so they swerve the conversation. We know that 75 per cent of disabled consumers will walk away from a store because of poor access or poor customer service.

The panel highlighted several overnight improvements that could be made, pointing out that a lot of barriers being created are to not to do with building accessibility but with accessibility on a grander scale. The quickest fix, Adams claimed, was improving a centre's online presence. He said that the accessibility of a centre website could dramatically impact whether a disabled person would decide to visit the centre itself.

The biggest takeaway, a consensus agreed upon by the panel, was that communication is key. You need to understand your shoppers needs in order to cater to them and you won't know that unless you talk to them. Go with them on their shopper journey and realise the fundamental pitfalls that can put up barriers to their shopping trip.


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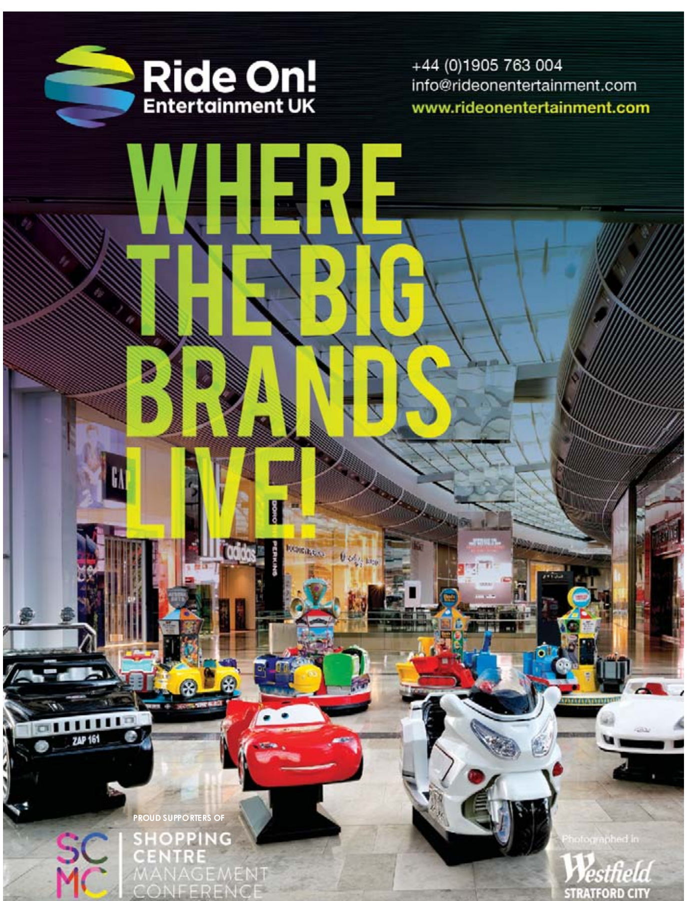
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SPACE REDEFINED

Alex McCulloch, associate partner at data analysts CACI, surveyed a rapidly evolving retail landscape

"Retailers and property companies are butting up against each other and are in conflict," asserted McCulloch. "Many retailers are doing well, but they're not translating that back to the landlord," he said. "There's a lack of honesty between landlords and occupiers."

At the same time investors are demanding less capex and better returns, so landlords are in a difficult place – innovation isn't being rewarded, according to McCulloch.

"We need a model where landlords and retailers collaborate more. Boxpark is an example, as is Westgate Social in Oxford, putting pop-up right at the heart of what they do," he said.

And all this happening at a time when conflicting messages make it difficult to plot a clear course. For instance, according to McCulloch we have entered what he calls the era of the contrary customer. "When shoppers go shopping they have high expectations," he said. "They're thrill seekers but at same time they're seeking hyper convenience. So we're receiving a discordant and contrary set of messages."

Similarly, McCulloch said property owners were seeking to create a sense of place at a time when retailers are all about consolidation. "There's a disconnect between two sides of the business," he said.

And the pace of technological change is a further cause for uncertainty. "On the customer side I can genuinely see a situation in five years' time when centre wifi will be unused because mobile data packages will have got so good," McCulloch said. But he believes all that bandwidth will open up opportunities for things like augmented reality, which retailers like Zara are already beginning to explore.

"We're in a vortex of change," McCulloch said. "Customers are demanding more of retail, and more retailers are falling by the wayside."

However he said a lot of the troubles retailers face aren't because of macro trends over which they have no control, they're simply about bad retailing. He cited Toys R Us as an example, where the brand was brought down by competition from rival discounters, both physical and online. "It's a commoditised marketplace where shoppers could price compare," he said. "The range hadn't kept pace, and the store experience had fallen behind."

This is an example of the way online retail has pushed offline forward as consumers shop in a more nuanced way. However McCulloch remains optimistic about the future of the physical store. "Click & collect is an online activity that requires a physical store," he said. "And most online spend sits with brands that also have physical stores, because they have greater brand loyalty." CACI calculates that 85 per cent of consumer spend still touches a physical store.

McCulloch also described the changing nature of shopping missions. "Shoppers shop shops, not asset classes," he said. "More and more, people are doing destinations shops rather than convenience, or high frequency low value shops," he said. "Flagship vs fundamental is a better segmentation than shopping centre vs retail park. One is a desire-based mission and the other a need-based mission.

"Retail is not dead - boring retail is dead," McCulloch concluded. "It's about engagement rather than experience."

RISING TO THE CHALLENGE

Shopping centres are under pressure from technological change. A panel looked for strategies to succeed in a challenging environment

Andy Davy, centre manager at the Mall, Maidstone, began: "One of the things we have to focus on is how to physically take on the challenge of the internet. But it's easy to lose focus on the fact that hundreds of millions of people still come through our doors – they're there for a reason."

Ricardo Varela, founder and CEO at digital marketing specialist Localistico agreed: "Physical assets are an advantage - you can use digital to encourage people to visit a physical place.

Jackie Tracey, commercialisation manager at NewRiver, highlighted the old-fashioned virtues of community. "Our shopping centres are very much community focussed," she said. "Our customers come for non-discretionary spend so they come a few times a week and are very loyal. That means it's important to communicate with them on a daily or weekly basis. Retailers are increasingly questioning the cost of marketing and are very aware of service charge costs, but they still want is to influence shopper visits.

"Often our customers are the elderly who visit for a social reason as much as for shopping, and we find the grey pound responds better to traditional ways of talking to them – posters and flyers on site, and above all by engaging with them on a personal level. There's a place for high tech but in in community centres you need to be sure that the traditional ways of communicating aren't thrown out."

Built environment specialist Mat Colmer said: "I feel very passionately that tech can engage the hearts and minds of consumers. We're seeing a shift towards engaging with the people who operate and occupy buildings because it all adds the to the overall sense of health and wellbeing.

"Technology can enable people to navigate round centre more easily, serving them with information to aid their retail experience, and also providing a service to visually impaired people.

"A big breakthrough has been the rise of citizen content – now you can have a direct consumer relationship with manufacturers. That completely changes the relationship between brands and consumers – winning over people and enabling them to achieve more. Shopping centres and retail environments should be making more of that.

Lunson Mitchenall director Nick Hartwell pointed out that the human element is still crucial. "John Lewis trained the staff at its new Westfield store at the National Theatre before opening. Their aim is to create sense of occasion every time you shop. Even security guards are ambassadors now," he said.

NewRiver's Tracey agreed: "The profile of centre staff is changing, we're trying to get the best out of staff to drive down service charge. We've got to recruit 'people people' and give them the skills and training they need, rather than what we did in the past which was to hire security people and then try to turn them into 'people people.' Giving people skills is one thing – changing their personality isn't going to happen."

Colmer concluded by pointing out that the pace of change is not going to let up. "What can we learn from other sectors that have been disrupted by technology?" he asked. "The music business no longer earns its money from records, it earns it from performances, selling experience rather than the product.

"It took 20 years for record labels to regain the market capitalisation they had back in 1998. Their problem was they were in denial that any transformational change was coming. Now we're seeing something similar with Uber and taxi cabs in London. Don't try and kill change, try and use it to your advantage," he concluded.

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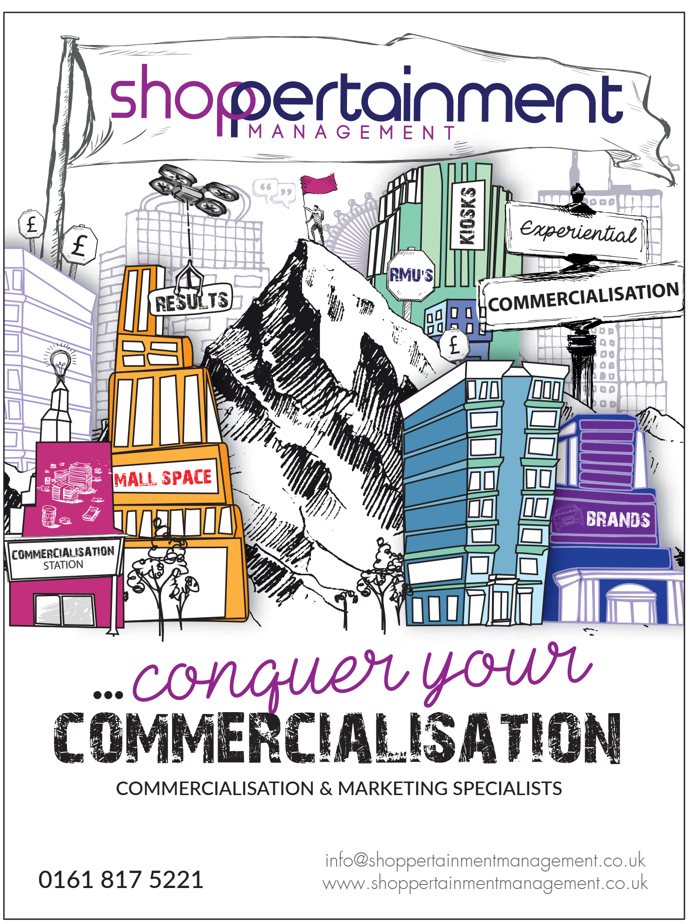

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THE RISE OF THE INDEPENDENT

A panel championing small, local retailers rounded off the day's proceedings.

The final topic of discussion for the day was the importance of the independent retailer. A panel made up of Paul Clifford, managing director at commercialisation specialist Space to Trade; Safia Khalid, an independent entrepreneur who has launched a chain of beauty bars and barbers; David O'Neil, head of commercialisation at Hammerson and Jonathan Ratnage, investment manager at Benson Elliot, chaired by the day's host Tanya Beckett, discussed the importance of small businesses.

Khalid set the scene by telling her small business success story of starting her own beauty and barber company which since its inception has grown into a successful 15-branch business with the help of Space to Trade. But she said that the work is not done, touching on the struggles of growing her business and the pitfalls that many independent retailers face.

"I love the mall space," she told the audience. "It's an easy-access place for customers to come and get a quick treatment. But in my experience I feel like we're sometimes viewed as secondary. For us to move forward this needs to change. There needs to be an understanding of the skill gap. You need to work with us. We need that support."

Clifford, whose agency helped Khalid to grow her business, said that when it comes to independent retailers landlords should treat them in the same way as the big brands in terms of offering permanence rather than short-term solutions. He pointed out, however, that independents do not have the same support network and so might need some guidance and a certain amount of leniency and flexibility when they are starting out, pointing out that a longer investment is likely to yield a higher return.

He said that it is just as much down to the centre giving independent retailers a space that is right for them that can place them where they are most likely to thrive: "The way to do it is generally to have a plan. You need to have a strategy and look at what is where and make sure you're not cannibalising. We look at gaps in the market, looking at the retail offering and what's there, what's not and then try to fill that gap, which is how we came up with the barber concept with Safia."

O'Neil gave the landlord's perspective, championing the passion of the independent in the backing of their own product, but stressed the importance of having a good business plan to ensure that their potential is met with success.

"We talk to the retailers about their business plans and what they expect to get out of their businesses from being in a shopping centre so we can make an estimation of sustainability," he explained. "We use the teams we have and the knowledge we have to give them some advice as to how they might tweak that business plan. Our general managers know their cities very well so they can give advice and insight into what customers may or may not like.

"We also tend to offer advice if we're concerned how they might present themselves visually. Independent businesses might not have that expertise, but everyone in this room will have people in their businesses who are experts in retail design. On the whole though, the retailers are more savvy than the term independent might suggest."

Finally, Ratnage offered a wider perspective of the independent market, saying that they are a reflection of both the local community and the retail landscape. He said that independent retailers provide a vital role in innovation and play a key role in him cities and town centres are evolving.

"We nurture our independent retailers from the very outset and we work with the local council in terms of their enterprise to actually bring in those independents and work with them on that. In doing that it's fascinating and mind-blowing to really see the passion and dedication the tenants are bringing to the city."

ACES HIGH

The presentation of the annual ACE Awards for customer service saw centre teams and individuals rewarded for achieving the highest standards in customer service. After a meticulous series of site visits, including two mystery shopper visits, Hammerson's Highcross Leicester won the Top Ace award while Ellandi's Howgate centre in Falkirk won the Judges' Choice award.

DINNER IS SERVED

In the evening the conference hall was transformed into a glamorous ballroom with decorations by Christmas Creations. Host of the gala conference dinner was comedian Mark Watson.





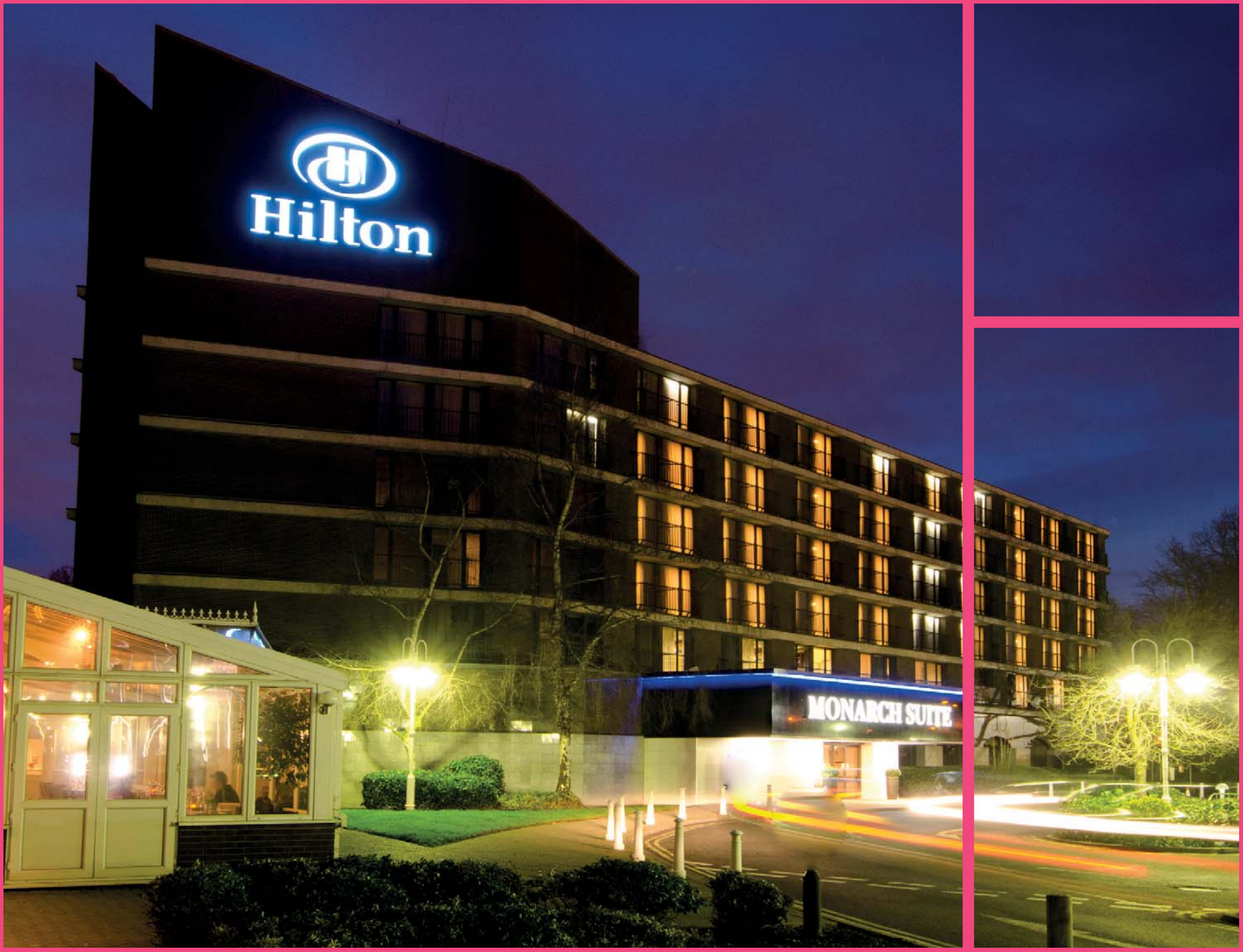

DESTINATION R

Revo president Mark Williams unveiled the new venue and rebranding for the annual Shopping Centre Management Conference.

He said the new branding will reflect the fact that retail destinations are now about far more than shopping. “People want places where they can eat, work, play as well as shop,” he said. “We’re all evolving into this mixed-use environment. Our customers are no longer just shoppers – they’re students, workers, diners as well.”

He said the new brand - Destination R – would attract an even broader base of people to debate the issues facing our sector.

Destination R will take place on Wednesday 3 and Thursday 4 April 2019 at the Hilton Metropole in Birmingham.



KIOSKS

Making the most of promotional mall furniture

Retail Merchandising Units (RMUs) and Mobile Promotion Kiosks (MPKs) are fixtures in every mall. Without them mall corridors would feel empty. They are integral to any commercialisation strategy as they provide a consistent source of income thanks to their prominent positioning. But the reality is that many centres are regularly mismanaging them and preventing them from living up to their full potential.

Jackie Tracey, commercialisation manager at NewRiver, says that using a proactive, hands-on approach is fundamental to help kickstart new RMU retailers. "We understand the shopper profiles and demographics of all our individual centres, allowing us to help newer retailers trial their concepts and then nurture and develop their businesses," she says. "Then, as they move to permanent occupancy, we continue to work with them on design and merchandising in order to help develop their business into something viable and sustainable."

She says that when it comes to RMUs, which are often short term, NewRiver uses the same approach as it does with long term retailers to help them as much as possible to make the most of their time in the centre. It is important, she says, to place pop-up retailers carefully and expand the retail proposition without standing on the toes of existing retailers by putting them in their sightlines.

"Our hands-on, personalised approach allows us to use kiosks effectively within our centres, that suit both the needs of retailers and customers," Tracey explains. "Many landlords have moved to mobile promotions kiosks to suit occupiers and their changing needs by using digital branding messaging. These mobile promotions kiosks are additionally more aesthetically pleasing, with operators accepting that landlords now demand higher standards of presentation within their malls."

Following an initiative to upgrade promotional presentation and improve aesthetics on the mall, NewRiver invested in 19 MPK's across the portfolio of shopping centres which are managed by the commercialisation agency Forum CentreSpace.

MPK's are the contemporary alternative to pop-up and provide a tailored advertising platform for large or small businesses. A new direction for promotional mid-mall activity, podiums and pop-up banners are substituted by modifiable digital content where graphics can be uploaded remotely through a cloud-based content-management system. Rachel Booker, media and marketing co-ordinator at

Forum CentreSpace, says that the possibilities are virtually endless when it comes to brands looking to promote, and a digital kiosk should never be blank.

"Promoters typically range from larger national organisations such as charities, utilities as well as smaller local businesses such as estate agents, foster care agencies, local schools and arts & culture organisations," Booker explains. "As a prime advantage over pop-up banners, promotional kiosks can be used as a manned base or as a running non-manned advertising display, which would appeal to smaller companies to reduce the costs associated with staffing."

While modern technology brings with it numerous advantages, there are also minor drawbacks that must be considered with the management of promotional kiosks. The functioning capability of the MPK itself usually relies on an internal 4G dongle to enable data transfer from the cloud-based digital signage.

Due to the very nature of technology promotional kiosks, are, at times, susceptible to minor glitches. Issues with the artwork itself are also a common cause for error as the graphics need to be designed to be compatibile with the content upload system. To resolve any issues with the MPK on site, commercialisation agency staff must assist in the recovery, as well as centre management teams and manufacturing companies where necessary.

"The MPK poses many advantages for large or small organisations alike," says Booker. "For SME's the prospect of creating graphics without the skill or knowhow can be a little daunting in comparison to larger organisations which often outsource their marketing to external agencies. For branding purposes, obviously the more creative the graphics the better however a simple logo file and retailer advert is all that is required. It does not have to be over-complicated."

One of the barriers for in shopping centres in recent years has been the stagnation of brands undertaking short term promotions in malls, with competition from supermarkets taking available advertising budgets. The reason for this has in part been down to centres being more selective in rejecting promotions due to their use of pull-up banners and pop up displays.

For this reason, MPKs were born to provide a professional advertising solution that came with a no-capital investment for property owners. David Pain, business director for venues at commercialisation agency SpaceandPeople, says that the digital mobile platform has revolutionised the mall promotions industry.

"It provides a professional platform for promotional activity to lift standards and unlock new or established promoters previously excluded for not meeting display standards," Pain says. "SpaceandPeople has invested heavily in this network of kiosks and manages the digital uploads, installation, maintenance, and cleaning of the units.

Pain says that in addition to these intended benefits, there are some unplanned benefits too. One of these is unlocking previously excluded promotional activity and enabling new promoters through a single site, thereby increasing demand for the site and increasing weekly rents.

An MPK can and should always be promoting something. If ever there is some down time between promoters, centre teams can utilise the digital screens with centre marketing or promoting tenants or CSR initiatives. The system is built to be flexible and easily managed by the commercialisation agency.

Recapturing short term promotions has been the goal of SpaceandPeople and one Pain says has been a success, but it has also led to breaking down barriers for RMUs.

"Successfully reviving short-term promotions also led us to consider how we could reduce some of the barriers to entry for new, local retailers too," he explains. "The limiting factors of RMUs are well known, principally the problem that a one-size-fits-all approach seriously limits the type of products that retailers can merchandise from a unit. Having to invest in a kiosk before a new retailer has developed a successful and sustainable business can prevent a lot of new local retailers from entering the mall space.

"Our solution to this key barrier to entry is to provide a range of POP Retail kiosks, enabling new local retailers to enter the mall space and established brands to pop-up without having to tackle the specialist subject of mall kiosk design first.

"We have even seen several online and local retailers use POP Retail kiosks for seasonal periods to complement their online activity and capitalise on the local demographic shopping centres provide. These often quirky and innovative products provide variance and vitality to the mall, and simply would not be feasible on an "one size fits all" RMU."

Handling full control of all commercialisation over to a third party is not always feasible, but by pioneering such innovations as the MPK and POP Retail kiosks, commercialisation agencies can work with shopping centres to meet specific aspects of their commercialisation mix such as supplying kiosks and the associated services as a stand-alone offering.

Optimising commercialisation in shopping centres is always challenging and demands on this very flexible aspect of property management disciplines are varied, ever changing and almost always urgent. Commercialisation specialists need to take the lead in adapting to changing environmental and commercial forces, and not just accept the status quo but work with shopping centre partners to provide solutions – that way they can continue to be the most immediate agents for change in shopping centres.

SURPASSING EXPECTATIONS

Going above and beyond with customer service can give centres destination status

With shopping centres, as with any consumer-facing business, there are a number of expectations that should be met in order for the business to thrive. What these expectations are will vary from centre to centre and will largely depend on demographic. For example, at a centre where the retail offering is geared towards older generations a simple thing like more seating can make all the difference. Recognising and providing solutions to these customer wants takes communication and it should not be a case of waiting for the shoppers to come to you with their suggestions.

"A first step is to train front-line staff," says Mary Henson, chief executive at the Agile Business Consortium. "They are the people closest to the customers. An interesting example is John Lewis providing theatrical training for the staff of their new Westfield London store because actors are excellent communicators and that's an important element in offering outstanding personal service."

Henson supports this level of service saying that older shoppers, who are a growing segment of the population, are more likely to are more likely to complain to retail staff about a lack of seating than they would be to actively contact centre management teams to share their grievances. But it is about more than old people wanting to sit down.

"The ethical credentials of organisations are often important for younger customers, with 50 per cent saying they boycott brands they consider behaving poorly," says Henson. "This isn't just about a bit of token 'greenwashing' but looking afresh at all of a centre's operations from charging points in car parks and waste recycling bins to reducing resource usage and providing community benefit."

The best way to find out what a shopper wants is to ask them, but unless you actively gather this information the best you can do is rely on inference. Targeting the individual shopper can be tricky, but there is a more consistent information pool in the form of retail staff. They are on the ground floor day-in-day-out and become accustomed to the way shoppers act, how they think, and what they want. They are a valuable asset when it comes to understanding shoppers wants and needs and communicating with them might prove invaluable in improving a centre.

An interesting example of going above and beyond is Rushden Lakes, which is situated alongside a lake and 200 acres of protected SSSI woodland. Its location provides it with a host of opportunities to go the extra mile for the shopper. "To ensure we can deliver an experience that is as outstanding as our natural location, we have adopted some innovative approaches to customer service," explains Hayley Turley, asset manager for Rushden Lakes.

"All Rushden Lakes staff are trained as customer service brand ambassadors," she continues. "This enables us to create a team culture where excellent customer service levels are second nature to everyone that our visitors interact with.

"Rushden Lakes is around 33 acres and by the time we complete phases 2, 3 & 4 it'll be approx. 1km from one end to the other. To ensure our customer service and security team can be everywhere our visitors need them to be, they patrol our park by bike. The bikes are sponsored by AJ Cycles – a tenant who will be joining us in phase 2 – and are equipped with defibrillators, first aid kits, car starter 'jump packs' and innovative firefighting equipment for those 'just in case' moments."

Whatever exceeding customer expectation entails, it is definitely something that all centres should aim for, and so the question that a centre should ask itself in regards to customer service is: what can we do to go above and beyond to make our centre a destination?

THE CLEAN STREAK

Keep up washroom facility cleanliness to prevent foul smelling reviews

Hygiene has a huge impact on customer perceptions, and the biggest offender when it is not up to scratch is the washroom. It is inevitable that a large proportion of shoppers will need to make a rest stop during their shopping trip, but often bad smells or poor cleanliness can be so off-putting that a shopper who has an unpleasant experience will rethink their entire shopping trip to avoid using the bathroom facilities.

Washroom supplier and management company Cannon Hygiene recently commissioned a YouGov survey of 2,000 people looking for the biggest offences that can be made in the washroom. The survey found that 97 per cent of people would be put off returning to a public venue if it had unclean facilities, and 85 per cent would share this negative experience with friends and family.

"Word of mouth is one of the easiest ways for a business to build or destroy its reputation, which can have a negative effect on footfall," says Steve Nurdin, marketing manager at Cannon Hygiene. "People expect the same high standards of cleanliness in a shopping centre that they would find on other destinations such as restaurants or hotels. The volume of people passing through a shopping centre each day can cause standards to slip as washrooms are one of the most visited locations in a retail outlet and are the first to show the strain."

Nurdin says that too often centres rely on a reactive rather than proactive approach to cleanliness, dealing with problems after they happen when it should be a case of preventing them in the first place. "Managers should employ systems that can work in the background and manage hygiene," he says. "For example, automated fragrance diffusers can help keep washrooms fresh throughout the day, and intelligent water management systems will monitor water usage and control bad odours – our study found that 63 per cent of people find bad smells their biggest frustrations in public washrooms."

Another source of shopper frustration is inadequate baby changing facilities which, given that there are over 3m children under the age of four in the UK and are of huge importance to parents, should be up to scratch. Research from Direct365 revealed the top five products that should be compulsory for all baby changing areas which were: a safety strap for the changing table, signposting to the changing room, hand sanitiser in addition to a sink, nappy bins and nappy bags, and a seat for older children or for breast feeding.

"A customer base of this size can't be ignored and outlets that don't adequately cater for this audience could be unwittingly deterring parents from returning," says Katherine Skinner from Direct365. "Feedback from the exercise found a number of recurring issues that places could quite easily rectify. For example, a common finding was overflowing nappy bins and a noticeable odour due to bins not being emptied regularly. Not having hand sanitiser, which can be more convenient for a parent to use should they be holding a baby, was also a problem. These issues can be fixed for very little."

Other problem points from the research included there not being enough space to accommodate prams, or changing facilities being confined to female toilets leaving men unable to change young children.

Bathroom facilities are a necessity not a luxury and maintaining a clean and welcoming environment is a must for any shopping centre to ensure shoppers have a pleasant and hygienic bathroom experience.

INTU LAUNCHES PROPTECH ACCELERATOR

intu is back on the hunt for next big thing in retail with intu Accelerate 2018

The incubation programme, now in its second year, aims to develop young businesses with fresh ideas that will help shape the future of the retail and leisure market.

Following on from a last year's success, which saw robots in centres, chat bots online and queue-jumping apps, this year's 8-week programme will fully immerse successful applicants in intu's business by providing mentorship from senior leadership, as well as experts from across the business and tech worlds. Those selected will have the opportunity to pilot and test their products while enjoying access to central London office space and potential investment.

intu chief executive David Fischel said: "Retail is one of the most dynamic industries in the UK, and we are continually looking to work hand-in-hand with some of the best talent out there, bursting with creative ideas, to find new approaches to improve our offer to customers and retailers. I'm very excited to see what this year's applicants will bring to the table. We're also hoping to identify start-ups for potential investment which in turn will help us deliver a healthy return."

intu Accelerate's class of 2017 included robot assistants from BotsAndUs; live in-store video experiences for online customers from GoInStore and tailored health assessments from Soza Health.

Soza Health's Steve Goldman said "This programme has been a 'game-changer' experience for Soza Health. It's been a joy being part of intu Accelerate. We've benefitted from a corporate infrastructure – something that start-ups never get – and we've had the opportunity to work with an outstanding team."

intu said Accelerate has five categories for start-ups to enter:

Capturing physical audiences digitally: How can we enhance and personalise the shopping experience and better understand our customers' needs by using data? We're looking for start-ups who can help us answer this question.

Events with a difference: We want to work with tech start-ups that can help us bring our communities closer together. We want to go above and beyond to surprise and delight our guests - this could be hosting educational events in our centres or opening up empty space for a monthly comedy night.

Virtual shopping assistant: We're looking to create the most seamless shopping experience for our customers through a virtual shopping assistant. We're looking for technologies that can understand our customers' preferences in order to lead them on a refined, personalised journey through our online channels and in our centres.

Categorising product data: We're looking for solutions to help us categorise the millions of products on our online virtual shopping centre, intu.co.uk. to improve the customer experience and drive even higher sales for our retailers. We want to hear from teams using visualisation, image recognition and other technologies.

Wildcard: We like looking for the new, creating something different and looking at things differently, so we had to include an open category for those who like to think out of the box. That's what the wildcard is all about.

intu Accelerate is being run in partnership with innovation specialists L Marks, who work with some of the UK's best known brands, including John Lewis, International Airlines Group and EDF Energy.

HAMMERSON INVESTS IN CONCRETE

Retail landlord invests in proptech start-up platform

Hammerson has partnered with Concrete, a proptech start-up platform set up to invest in and support the most promising technology start-ups in the property industry focused on driving efficiencies and responding to changes in sector.

This latest technology tie-up means Hammerson will have proprietary access to a new age of ideas, talent and enterprise as it continues to embrace new technologies and innovation to support its business strategy.

Launched by leading specialist tech start-up investor, Seedcamp, and renowned real estate venture capital and private equity firm, Starwood Capital Group, Concrete aims to identify and work with start-ups that address key challenges across property development, leasing, asset management as well as acquisitions and disposals.

Hammerson joins Concrete as its strategic retail partner, bringing its extensive expertise and knowledge of the retail industry. Alongside other strategic partners including JLL, Skanska and Fora, Concrete has succeeded in bringing together an innovative combination of businesses with a wealth of experience in real estate, investment and tech, and has already made 10 investments to date.

Not just in the real estate sector but in an evolving, omni-channel world of retail, innovation continues to underpin Hammerson's portfolio-wide asset management strategy. The business has a long history of working with partners and start-up retailers in order to deliver an engaging and exciting shopping experience throughout its centres.

In 2017, Hammerson partnered with leading artificial intelligence tech group, Cortexica, to launch an industry first – Style Seeker, its product search tool which is integrated into apps for each of its centres. That artificial intelligence innovation continues with the roll-out of Chatbots across the shopping centre portfolio following a successful trial at Bullring in Birmingham.

Concrete's investment in promising start-up companies enables them to not only access capital for growth, but build industry relationships and accelerate product development. The partnership is already working with companies including Hubble, an online workspace platform and Beaglie.ai, a legal artificial intelligence company.

Kathryn Malloch, group product innovation manager for Hammerson, said, "The partnership with Concrete provides us with a unique opportunity to gain a deeper insight in emerging technologies and take our leading approach to innovation a step further. Working with ambitious prop-tech businesses allows us to support their growth while at the same time offering us creative solutions and a fresh way of approaching challenges to the retail sector."

Taylor Wescoatt, founding partner of Concrete, added: "Hammerson's impressive commitment to innovation and engagement with the early stage tech community is exactly what we believe will create the winners in the space. We are excited to work with Hammerson in defining and creating iconic retail destinations."

Independent retail and leisure openings soar

As multiple stores like New Look, Maplin and Toys 'R' Us close at a rapid pace, landlords are look to independent stores as saviours. Often, independent goods have an unrivalled quality and the service is intimate, offering a retail experience that is memorable and tailored to the customer.

Inspired by the rise of independent stores, British marketplace OnBuy.com considered retail and leisure multiple and independent openings and closures in 2017. The study identified areas where multiple stores have declined in comparison to areas independent stores are opening.

It was found multiple store closures have been seen in every region – except Yorkshire and the Humber with a rise of 11 openings. The steepest falls were seen in the West Midlands (-143 multiple closures), Greater London (-92 multiple closures) and the East of England (-86 multiple closures.)

Independents, on the other hand, grew everywhere except in the East (-19 independent closures) and South West (-29 independent closures.) Closing at a much lower rate than multiples across the UK.

North West (230 independent openings), West Midlands (194 independent openings) and Scotland (114 independent openings) saw extraordinary growth in their independent store markets. Looking a individual sectors, barbers, beauty salons, cafes and tearooms, convenience stores and tobacconists/vaping shops are growing fastest, according to the Local Data Company's Retail and Leisure Trends report. In contrast, public houses and inns, clothes, newsagents, bookmakers and shoe shops are suffering closures.

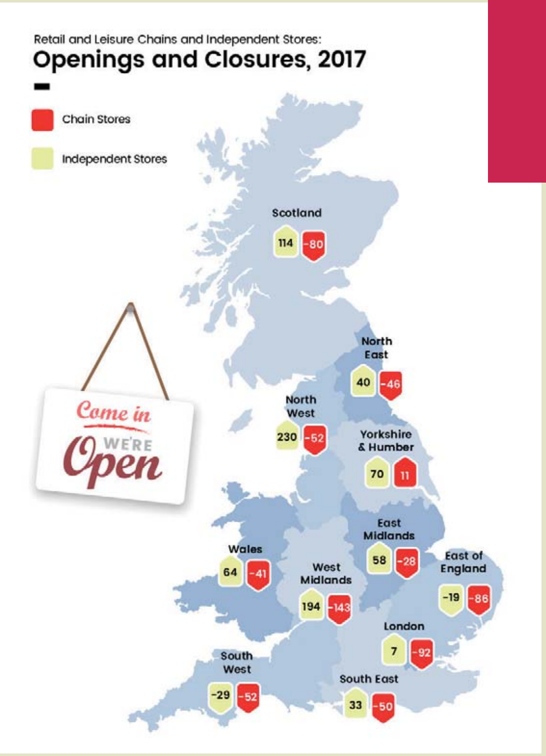
OnBuy.com considered retail and leisure vacancy rates by region, since the end of 2016, and found that only three regions have seen an increase: Greater London (up +0.1%), the South West (up +0.1%) and Yorkshire and the Humber – with the biggest increase of +0.6%.

The best, and doubtless welcome decrease was in the North West, which improved by -0.2%.

Indeed, regions that currently hold the highest rate of vacancy include the North West (15.1%), the North East (14.8%) and Yorkshire and the Humber (14.5%.) Alternately, the Eastof England (10%), South East (9.9%) and Greater London (7.5%) hold the lowest rate of vacancy.

Cas Paton, managing director of Onbuy.com, said: "In the grand scheme of things, vacancy rates are low. The fact that only three regions have seen an increase in vacancies is positive and we must focus on this. Otherwise, we risk consistent, unobliging news of multiple closures obscuring our vision and progress to develop the retail world.

"It is sad to see well-loved, British companies closing, but we must move with the times. Keen businessmen and women have their eye on vacant spaces across the country and we must support our local independents, bricks-and-mortar businesses. It's the only way for retail to survive."



REGIONAL STORE VACANCY RATES

North West	15.1%
North East	14.8%
Yorkshire and the Humber	14.5%
West Midlands	14.2%
East Midlands	12.1%
South West	10.1%
East of England	10%
South East	9.9%
Greater London	7.5%

Reinventing the department store

Department stores, once considered retail innovators, have to make disruptive changes to their business model to survive the onslaught of specialist and online retailers, says leading data and analytics company GlobalData.

Department stores established retail dominance by scaling up their operations and distributing mass produced goods in large stores that provide huge product portfolios combined with advice from helpful staff members.

However, their competitive advantage gradually eroded with the advent of more fashionable and efficient retailers, coupled with their own poor online strategies and a host of various other operational and marketing issues.

As the new generation of tech-savvy shoppers began preferring to shop at specialist retailers with stronger brand identities or on online platforms like Amazon and eBay that provide lower prices and more targeted recommendations, department stores fell behind their competitors.

To compound their woes, hard discounters and even some convenience stores manage their operational costs and supply chains more efficiently, which allows them to offer products at lower prices while maintaining a profitable margin. In contrast, many department stores failed to upgrade their stores, and suffer from an oversupply of space combined with increasing costs including store rents, labour and supplies.

Andreas Olah, digital retail analyst at GlobalData, says: "Department stores have finally realised that they are no longer market leaders and have to make disruptive changes to their product offerings and business models, and bring in digital technologies to reach out to customers in a modern and engaging way. They also need to upgrade their supply chain, logistics and staff management systems to improve margins and remain competitive."

A range of technologies and solutions such as artificial intelligence (AI) and augmented reality can improve the competitiveness of department stores. However, they need to be in line with their brand identity and the existing setup of systems and processes.

Olah continues: "To compete with specialist and online retailers, department stores need to establish an omnichannel strategy that allows customers to seamlessly complete their shopping. They should also judiciously use space to offer distinctive in-store experiences that may include areas dedicated to product demonstrations, games, cafes, and click-and-collect. Smart devices such as interactive kiosks, tablets and digital signage can be installed to improve customer interaction, while also enabling data collection for customer profiling and analytics to enhance operational efficiency.

"Upgrading and integrating their various databases and management systems can help department stores to upsell products and ensure that marketing campaigns and product strategies resonate well with their target customers. It is equally important that back-end processes are improved to make them more cost-efficient, error-free and secure."

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REAL ESTATE... MEET THE REAL WORLD

It's time for the property industry to get real, says **Morgan Garfield**

Matthew Vincent opened a recent article in the FT with the following paragraph, which I love: "Apparently, there are still people who buy things by travelling to large buildings called shops, viewing and selecting items and then handing over papery notes and metal discs. Amazing, eh? They probably still read newspapers. And don't expect informed comment on the day's business news to be written, edited and electronically delivered to them by 8am every morning. Who are these people? I rather like them."

The reality is that hardly any of the 60 million people in the UK want to consume business news, period, let alone electronically or before 8am. Yet, if you are an FT journalist you are focused on those that do and you have a bias towards viewing the world through their eyes. This probably forces Mr Vincent to be at his laptop in the early hours to satiate the demands of the financial and business elite.

While mingling with the elite of the property world in Cannes last month it occurred to me that our industry is similarly self-absorbed.

The most popular question we faced was "What is happening in retail? Nobody shops anymore it is all about Amazon." For the wealthy few who can pass off a week in Cannes as work, who shop from their desk for high value items unconcerned about delivery charges, this may be the case. But as with readers of the FT, the relatively wealthy who work in real estate do not represent the real world.

The Ellandi portfolio gets 160m visits from 'normal' people across the UK. These people come to buy every-day essentials often from value and discount retailers. They rarely read the FT or visit Cannes. They typically have a limited budget and want to ensure that they get the best value for money for their families.

Our 2018 shopper survey shows that 76 per cent visit our community shopping centres at least once a week and that only 19 per cent shop online as frequently.

The vast majority of the UK population choose to shop in their local centres as it fits around their daily lives and offers them value for money. It also gives people a social experience that many people enjoy, 43 per cent of our shoppers state that this is a factor as to why they visit our shopping centres.

As Mr Vincent points out in his FT article, selling a Primark t-shirt for £2 online is not economical and this applies to a whole range of lower value essential goods. It is neither economical for retailers or shoppers to facilitate low value orders on-line, the best channel for both sides is the shop.

There are challenges in retail but it is not all about Amazon. The squeeze on disposable incomes, as inflation outstrips wage growth for many 'normal' people is of much greater concern to retail, property and society than the internet. Again, this impacts some more than others and is not reflected in the quantum of Amazon parcels delivered to gleaming offices across Central London. (Deloitte research shows that higher income consumers are 52 per cent more likely to shop on-line.)

Real estate performance is a derivative of what happens in the real economy. To understand what is happening in retail property requires that we make an effort to understand how real people shop, as most real estate professionals are not really exposed to the real world. There are "...still people who buy things by travelling to large buildings called shops, viewing and selecting items and then handing over papery notes and metal discs."

The great British public at large will not be reading this, browsing the FT or going to Cannes but they are shopping at community shopping centres across the country proving that there is still life beyond amazon and a robust future for essential community Shopping centres.

Morgan Garfield is MD and owner at Ellandi.

Experiential Easter

The trend towards experiential marketing was more apparent than ever this Easter, as centres focused marketing spend on child-friendly events. Intu led the charge with two nationwide campaigns featureing Lego and Nickelodeon.

Voted the UK's strongest super-brand of 2018, Lego partnered with intu to launch the Lego Friends House of Heart Tour across its centres this Easter. Lego Friends gave families and children the chance to take part in fun activities inspired by the Lego Friends in Heartlake City.

YouTube stars Tiana from Toys AndMe, Ruby Rube, SassyBelle, Rosie McClelland and Mia from Mia's Life came together to form the Lego Friends Heart Squad.

Roger Binks, customer experience director for intu, said: "Our exciting partnership with Lego is yet another example of how we want to make all our customers smile and make them feel happier than when they first walked through the door."

At the same time kids entertainment brand Nickelodeon collaborated with intu for a major slime-related activation involving a specially created slime-ulator which is in the middle of a month-long tour of intu shopping centres in the UK .

Being slimed by Nickelodeon is the ultimate badge of honour and the physical embodiment of the playful and unconventional nature of the kids brand. All intu shopping centres including intu Trafford Centre, intu Lakeside and intu Metrocentre are also hosting a range of free slime-themed activities.

Binks explained: "We're looking to replicate the success of last Easter's campaign with Nickelodeon when 8,000 people registered to meet Paw Patrol at intu centres and 180,000 people visited intu's event pages."

The power of brand partnerships was also apparent at Bluewater, when Landsec built on its exclusive partnership with Aardman and Studiocanal to celebrate the release of the prehistoric comedy adventure film, Early Man.

Following the launch of the film, Bluewater hosted a series of unique in-mall experiences for guests, including the augmented reality trail which allowed visitors to meet the characters and download content via a specially designed Aardman app. A film character modelling workshop, Early Man rock installation and photo opportunities completed the experiential line-up of activities which was further supported by an extensive media campaign within the malls.

Sharon Smith, commercial partnerships manager at Bluewater, said: "We always aim to offer something exciting for our guests and all the elements combined brought such an immersive experience to our destination, and one that was enjoyed across all generations. This latest partnership demonstrates our commitment to creating unique, memorable experiences for guests that appeal to today's consumers, confirming Bluewater's status as Europe's leading retail and leisure destination."

This month's moves . . .

Outlet leasing and development specialist CHAMELEON RETAIL has appointed ADRIAN TAYLOR as leasing director. He was previously leasing manager at Fashion House Group where he worked for over nine years on projects in Central Europe, including Romania, Poland, Switzerland and Russia.

GVA has appointed JONATHAN ESSEX as a director in its retail, hotels and leisure team. He brings more than 15 years of experience, most recently at Colliers where he has been a director in the licensed & leisure department, leading the lease advisory team in the south, since 2012. Prior to this, he worked at BNP Paribas Real Estate in its retail and leisure lease advisory team.

CUSHMAN & WAKEFIELD has significantly strengthened its retail team with the appointment of three new Partners. RORY NEWSOME joins the central London retail team from Capita/GL Hearn, where he was the director for lease advisory in the retail advisory team. DAVID MCCOSH is also joining the central London retail team from JLL where he was a director within retailer services UK. OLIVER SERRANT also joins from JLL, where he has been a director in the retailer services team for almost five years.

GVA has announced several internal appointments to help support the delivery of its business growth. CHRIS CHEAP, regional senior director of GVA's Manchester office, will join its management board to represent GVA's 12 regional offices and guide alignment of regional with national activity. CARL POTTER has been appointed as regional senior director of GVA's Birmingham office to replace IAN STRINGER who is stepping down after 10 years in the role.

KNIGHT FRANK RETAIL has appointed PAT KEENAN as head of retail agency, adding to its senior team. He started his career at Healey & Baker before joining Churston Heard, where he became national retail director, before co-founding his own practice, K2 Retail.

LONDONMETRIC PROPERTY has appointed SUZANNE AVERY to the board as an independent non-executive director. She has over 25 years' experience in corporate banking, holding various managing director roles at RBS. She is currently a Church Commissioner, senior advisor to Centrus Advisors and a non-executive director of Richmond Housing Partnership.

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