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Editor's letter

Hammerson has come out fighting after taking a beating from the media and the markets over its clumsy handling of the intu and Klepierre bids earlier this year. Focussing on top-tier malls and premier outlets allows Hammerson to build on its existing strengths. And the move to cut the amount of floorspace dedicated to department stores and fashion brands will allow it to differentiate its malls with a more experiential offer.

Equally cutting back on development looks sensible in an uncertain retail climate, but deciding on which mega-project to ditch – Brent Cross or Croydon – must have been challenging. I suspect the attitude to a delay by the respective partners – Aberdeen Standard or URW – may have been the deciding factor.

By committing to £1.2bn of disposals to pay off debt and buy back shares David Atkins and his management team hope to drive up the share price, justifying the assertion they made in the Spring that Klepierre's bid of 635p a share undervalued the business. However, it remains to be seen if this is sufficient to appease disgruntled shareholders. So far the share price has remained unmoved and Klepierre is free to come back with a new offer in October.

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First signings at O2 outlet revealed

AEG and Crosstree Real Estate Partners have revealed their vision for Icon Outlet, the 210,000-sq ft premium urban outlet that opens from this October under the famous tented roof of The O2 in Greenwich, south-east London, bringing shopping to the world's number one entertainment venue for the first time.

Together with the construction of a 50,000-sq ft cinema extension for Cineworld and a 30,000-sq ft trampoline park, leased to Oxygen Freejumping, the UK's leading operator, the O2's offer is being evolved to reflect the consumer-led convergence of retail, leisure and entertainment. In total, over 75 per cent of the space under development is let or under offer.

Consisting of 85 stores and 35,000 sq ft of new restaurants, cafés and bars, Icon Outlet will provide the best of accessible premium fashion and lifestyle brands. Leading UK and international retailers, such as Hackett, Ted Baker, Guess, Gant, Calvin Klein, Crew Clothing, Jack Wills, Kurt Geiger, Aspinal of London, Levi's, Pepe Jeans, Clarks and Skechers are among the brands to have signed already.

Alistair Wood, executive vice president for real estate and development for AEG, said: "Icon Outlet is the most relevant retail and leisure destination set to open in Europe this year."

CBRE and CWM are the retail leasing agents for Icon Outlet.

Four sign in Corby

Europa Capital and Sovereign Centros have signed leases for a total of 2,500 sq ft with jeweller Warren James, Eurochange, Electromist and expanding local estate agent Chris George.

The Europa Capital and Sovereign Centros partnership acquired Corby Town Shopping & Willow Place in March 2015. The shopping centre comprises 800,000 sq ft, providing 146 retail units, plus offices and residential. The centre is anchored by Primark, H&M, TK Maxx, Wilko and Boots. Other key tenants include River Island, New Look, Dorothy Perkins/Burton, JD Sports, Clarks, Costa Coffee and Peacocks.

Jack Gordon, development and asset manager at Sovereign Centros, said: "Overseeing the asset management of the town centre has allowed us to relocate and right-size existing tenants to make way for some of the new names. This is alongside a number of recent and ongoing lease renewals, upsizes and lease re-gears that have demonstrated commitment to the town centre and its ever-growing resident population."

Hammerson welcomes fashion giants to Bristol

Hammerson's Cabot Circus is due to welcome H&M's & Other Stories and Inditex's Bershka to Bristol. Located in prime retail pitches on the ground floor of Cabot Circus, the new & Other Stories and Bershka stores of 12,682 sq ft and 8,416 sq ft respectively will cater for demand from youthful style-conscious shoppers, offering a range of clothing and accessories in eye-catching double-height shops, designed to engage and appeal to their target consumer demographic.

The deals represent a renewed commitment by global retail giants H&M and Inditex. H&M already trades its main façade as well as Cos and Monki at Cabot Circus while Inditex already has Zara and Pull & Bear stores in the centre.

Ian Mitchell, UK commercial director at Hammerson, said: "As one of the UK's major retail hubs, we are pleased to see appetite from major retail groups to take further space at Cabot Circus. Providing a varied and high quality fashion offer for our shoppers is key to ensuring Cabot Circus remains the region's leading retail and leisure destination."

Mackage
BOSS
ZARA

Koreans buy in Brum

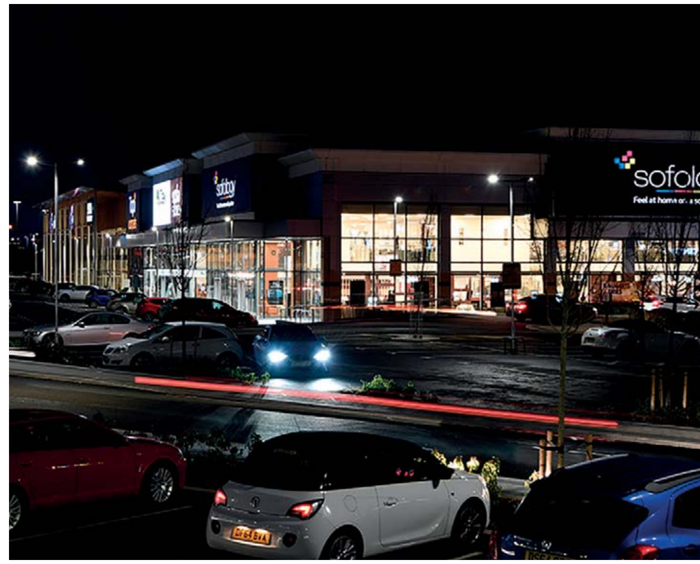
In the biggest out-of-town investment deal of 2018, KKR has sold its retail park at Junction 9 on the M6 to Hana Financial Investments and Korea Asset Investment Management for £175m.

The park was acquired by KKR's Real Estate Opportunity fund together with its operating partner Quadrant Estates in 2014 by piecing together three separate ownerships at a cost of £123m.

In addition to amalgamating the three distinct parks to create one homogeneous shopping park, Quadrant consolidated Curry's and PC World, sub-divided 49,000 sq ft of vacant space and developed 33,000 sq ft of new space including four new restaurants. All the units were pre-let to retailers including M&S, JD Sports, Sofology, DFS, Nando's, Costa and Smash Burger at rents of up to £45 psf. This increased the rent roll to £2m pa as well as driving increases in customer numbers and frequency of visits.

Guillaume Cassou, head of European real estate at KKR, said "We backed a fundamentally good asset in need of repositioning and Quadrant implemented an intensive business plan over four years that has resulted in a great end product, which we have now sold to long term income-focussed capital.."

KKR and Quadrant were represented by JLL and Wilkinson Williams. Hana and KAIM were advised by Montagu Evans.



Grosvenor launches new Mayfair destination

Consultation has begun on the development of the South Molton Triangle in Mayfair. Landlord Grosvenor has been working with Westminster City Council on options for the site bounded by Davies Street, Brook Street and South Molton Street. The area is well-known as the home of Grays Antiques market and lies immediately opposite the new Elizabeth Line Bond Street West station. It also encompasses a number of narrow side streets which Grosvenor believes, with investment, can be used to safely disperse pedestrians from the new station and provide other services to the area.

Grosvenor executive director Simon Harding-Roots said: "The West End is currently ill-equipped to cope with the levels of pedestrian traffic we already see every day, let alone the arrival of thousands of extra visitors expected from the Elizabeth Line.

Many of Mayfair's pavements are too narrow, routes were built for a different era and, perhaps counter intuitively, there are not enough services for those living in and visiting the area."

The proposals include the creation of inviting and safe pedestrian routes bordered by new mixed-use buildings, which will allow both residents and local workers to continue to enjoy Mayfair even as pedestrian numbers grow.

Reef lands Gravesend scheme

Reef Group has replaced Edinburgh House on the Heritage Quarter scheme in Gravesend after agreeing a deal with Gravesham Council which will see the transformation of the St George's shopping centre and open up development opportunities in the Eastern and Western Quarters of the north Kent town.

Under the arrangement the council has entered into a head lease arrangement with Aviva Investors to provide the funding for the works to take place. As part of this deal the council has entered into an exclusivity agreement with Reef Group in relation to the Eastern and Western Quarters of Gravesend. This will allow Reef Group sufficient time to develop their proposals for the site, working with the council.

Council leader Cllr David Turner said: "By working with Reef Group, we will stabilise and invigorate the retail environment of the St George's shopping centre by introducing a leisure offer and improve the centre's signage and branding, walkways and general environment."

IKEA launches city centre format

IKEA has unveils plans for a brand new shop on London's Tottenham Court Road, as part of a new global city centre approach. The new shop is due to open in Autumn 2018 on the former Mulityork site and will specialise in helping people with larger-scale home projects, such as a new kitchen or bedroom.

This is the first step in the retailer's revised strategy, which will focus on city centres, enhanced customer services and digitalisation. In addition to the new Tottenham Court Road shop, IKEA is currently exploring other locations in London for similar outlets as well as opportunities to test and trial different formats in the city centre. IKEA will also be opening its leading sustainable store in Greenwich in 2019, which will offer a variety of key features to help Londoners live a more healthy and sustainable lifestyle.

Javier Quiñones, IKEA UK & Ireland country retail manager, said: "In a fast-changing retail environment, the opening of this new city centre shop marks an exciting development for the IKEA business as we continue to innovate and transform to better meet the needs of our customers.

"Urbanisation and inner-city living are trends that continue to dominate the market. By launching this new approach and investing in our online offer and services, we are working to ensure IKEA remains affordable, convenient and sustainable, both now and in the future."

Mermaid catches Everyman

Schroder UK Real Estate Fund has signed a deal to bring Everyman Cinema to Cardiff's Mermaid Quay, as part of the strategic repositioning of the 150,000-sq ft mixed-use destination on the waterfront in Cardiff Bay. Plans include a comprehensive refurbishment of the public realm, in line with Cardiff Council's ambitious vision for the future of the Bay.

The 11,500-sq ft five-screen boutique cinema will be Everyman's first opening in Wales and will trade alongside Mermaid Quay's vibrant mix of top high street and independent food & beverage brands. It is expected to open in Autumn 2019.

Mermaid Quay, which will mark its 20th anniversary next year, attracts around 5.5 million visitors a year. SREF recently secured consent for a programme of improvement works that will transform the scheme, creating a more contemporary dockside feel in keeping with Mermaid Quay's spectacular waterfront location.

SREF investment manager Harry Pickering said: "This has always been an unrivalled location and our transformative plans will further maximise this, ensuring Mermaid Quay retains its status as one of the most popular leisure locations in Wales."

Delancey wins Elephant & Castle consent

At the second time of asking Delancey has won Southwark Council's approval for the demolition of the 50-year-old Elephant & Castle shopping centre in South London and its replacement with a mixed-use development. The mix of affordable housing has been amended since the first application was thrown out in January 2018 to include more council housing.

The proposals included:

- Around 170,000 sq ft of leisure, shops and restaurants
- up to 1,000 new homes for rent
- A new building for London College of Communication and University of the Arts London
- New Northern Line entrance and ticket hall and improved access to Elephant & Castle mainline railway station
- 2.5acres of high quality public realm

Delancey's investment director Stafford Lancaster said: "Our proposals offer a once-in-a-lifetime opportunity to deliver a new town centre for the area, with each of these elements dependent on being delivered together. This includes a modern transport system, and a commitment to maintaining the area's unique and vibrant culture. The new town centre will include a range of high street and independent retailers, enhanced restaurant and leisure opportunities and much - needed housing on a site where there is currently none."


GAP
Boots
GOLDSMITHS
H&M
H&M
The Entertainer

SHAKE-UP AT HAMMERSON

Hammerson quits retail parks and postpones Brent Cross extension

Faced with a potential shareholder revolt in the wake of its abortive mergers with intu and Klepierre, beleaguered shopping centre investor Hammerson has unveiled a new strategy to focus on core areas of business.

The company will exit the out-of-town retail sector and cut back on its development exposure. It will now focus on prime city centre malls, primarily in top 15 European cities, and premium outlets across Europe.

At the same time, in a bid to enhance shareholder returns, Hammerson is launching a share buyback programme and reducing debt. Head office costs will also be cut.

The strategy review was unveiled along with the company's half-year results, which showed the size of the challenge facing chief executive David Atkins and his management team. Net rental income was down 3 per cent year-on-year at £178.5m; retail sales in the UK were down 2.5 per cent and footfall in the UK down 1.6 per cent, although in France sales were up 2.9 per cent and footfall up 2.3 per cent. Occupancy stood at 97.2per cent and the period saw a small uplift in leasing volume at UK shopping centres from £6.6 to £6.8m.

However, the company described "an unusually turbulent retail backdrop" which saw 104 units across the portfolio enter administration or CVA, of which 87 are still trading. These slashed net rental income in the first half by £2.1m and the full year impact is anticipated to be £5.8m or 1.5 per cent of Hammerson's current rent roll.

Overall profits for the six months ended 30 June 2018 were flat at £120m.

Against this backdrop, chief executive David Atkins unveiled the results of a strategic review of the business drawn up with management consultants McKinsey. He explained: "Our results demonstrate the resilience of our business. We are taking tough decisions and have absolute conviction in our ability to deliver. By reprioritising our capital deployment and repositioning our portfolio, we will accelerate future shareholder value and returns."

In practice this means stepping up the pace of disposals, including the complete withdrawal from the retail parks market. Hammerson had been aiming to sell £500m of stock this year but the target has been raised to £600m. This target includes July's sale of two retail parks for £164m, significantly 10 per cent down on their December 2017 valuations.

The proceeds will be used to pay down debt and £300m has been earmarked for share buybacks to bolster the share price. Management is under pressure to achieve a share price of 635p, which Klepierre offered for the company in April.

Withdrawing from the out-of-town market will trim operating costs and long-standing chief investment officer Peter Cole will retire at the end of 2018. Simon Travis will assume responsibility for investments, and Mark Bourgeois for development. Jean-Philippe Mouton will also step down from the board but will stay on as head of the French business. Overall the company is targeting £7m of cost savings annually.

Hammerson is also cutting back its UK development programme. The planned redevelopment of Brent Cross, which would more than double the size of the scheme, has been put on ice. But the company says it remains committed to the redevelopment of the Whitgift and Centrale shopping centres in Croydon where it is in a JV with Unibail Rodamco Westfield. The CPO process is expected to be triggered shortly with a view to starting on site in 2019.

The changes will leave a slimmed-down Hammerson with a clear focus on two sectors: prime city centre malls in the UK, France and Ireland and premium outlets across Europe, held through its stakes in operators Value Retail and VIA Outlets.

Specifically within shopping centres, Hammerson intends to lessen its reliance on fashion brands and department stores, according to Atkins. He explained: "Our customer and retailer offer will be amplified, and this includes a step change in our retailer line up. We will reduce the amount of floor space let to department stores and high street fashion as we actively focus on the latest consumer trends and take bolder steps to provide the best retail mix."

This will mean a broader retailer line-up: shrinking department store space by a quarter and high street fashion by a fifth, and replacing them with differentiated brands, aspirational fashion, leisure, events and lifestyle spaces.

Initial reaction from the market was less than ecstatic, with the share price barely unmoved at 540p.

HOUSE OF FRASER CVA CHALLENGED

A group of landlords has launched a legal challenged to department store group's controversial CVA proposals

A group of landlords represented by restructuring firm Begbies Traynor and JLL has launched a legal challenge to House of Fraser's CVA on the grounds that it is unfair to certain creditors as well as containing procedural irregularities. The petition in the Scottish Courts has been expected ever since a majority of creditors voted to accept the CVA which would see the closure of 31 stores..

The petition has been lodged by Mark Fry of insolvency specialist Begbies Traynor and Charlotte Coates of JLL, who have been advising House of Fraser landlords during the CVA negotiations. In a statement they said: "As far as we are aware, this is the first such instance of a legal challenge to a CVA in Scotland, which has been filed to seek to ensure that landlords, many of whom represent the pension funds of the man on the street, are not unfairly treated in the House of Fraser CVA or future CVAs."

They continued: "Having worked with Mr Philip Holden and drydensfairfax solicitors and based upon opinion from legal counsel, our group believes that certain landlords have been unfairly prejudiced during this process and that there have been alleged material irregularities in the implementation of House of Fraser's CVA. Our clients have therefore taken the decision to formally file a legal challenge to the CVA, to protect their interests and seek to ensure that landlords are not unfairly treated in the same way in future CVAs.

"We strongly believe it to be unjust for the existing shareholder in House of Fraser to receive £70m of value, the details of which were not communicated initially, whilst certain landlord creditors are shouldering the financial impact of the process. It is our view, and that of our legal counsel, that landlords have been disproportionately affected during this CVA process; not only compared to other creditors, but also to how they could have been treated if alternative routes to rescuing the business were fully explored.

"As a group, landlords experienced a complete lack of meaningful engagement and transparency from the outset of the House of Fraser CVA process, despite repeated requests for details on how the company is expected to trade over the next seven months under the CVA. To date, no information has been provided to our landlord group, with no guarantees that the business will continue, leaving landlords unable to reasonably assess the likelihood of success or otherwise of the company's future rescue plan.

"CVAs were designed as a means to rescue a business, not simply a tool to shed undesirable leases for the benefit of equity shareholders. They should set out a clear plan for the sustainable future of that business and the proposals should not be disproportionately detrimental to or prejudiced towards a targeted group of creditors. Our landlord group believes that House of Fraser and its advisors have failed on both counts.

"It is our collective view that the retail CVA process in the UK has become fundamentally flawed and needs correcting. Applying a 75 percent arbitrary discount to the value of landlords' claims has no basis in law and impacts the likely outcome of the vote given that those landlords who will lose out have their voting rights and ability to object or negotiate severely curtailed. The application of the discount clearly means that dissenting voices are more easily silenced.

"As commercial landlords in the retail sector are often pension funds, representing the retirement income of the man on the street, we believe it is important that the recent approach to CVAs is tested in the courts rather than be allowed to further prejudice landlords while undermining the value and attractiveness of UK real estate as an asset class."

RETAIL REDEFINED

Calls for a new classification of shopping centres to match changing shopper patterns

Trade body Revo has launched an industry-wide consultation with a view to establishing a formal classification structure for retail assets in line with global industry standards. The UK does not currently have its own established classification for defining the spectrum of retail properties and Revo is therefore seeking to develop a classification that can be adopted across the industry, to provide clarity and properly reflect the diversity of retail asset purposes in the UK today.

Revo president Mark Williams said: "The retail landscape has undergone monumental change in the last five years, and the way that we, as an industry, describe retail assets needs to follow suit. The case for this is clear; The descriptions 'primary' and 'secondary' are anachronistic, subjective and too simplistic. We need a wider, more objective range of categories which recognises that different locations fulfil different consumer needs, and which will support a more accurate assessment of assets. Investors, banks, analysts and valuers are all asking for better clarification, and this will provide it."

Currently the only widely used shopping centre classification in Europe and the UK is the International Council of Shopping Centers' classification. It is used by real estate advisors for market overviews, international comparison studies and statistical purposes. Unlike the ICSC's US classification, the European equivalent is focused mainly on the size of the scheme and does not take into account the specific characteristics of different types of shopping centres. There is no UK-only classification.

Revo has produced a proposed draft classification that splits centres into three broad categories – 'Regional', 'Local' and 'Specialised'. Within each of these groups, three subcategories are proposed to provide clarity over purpose and function. Revo is inviting the industry to debate and agree the objectives, outputs and outcomes of this work, along with the specific language within the classification. A wider survey-based consultation will also be undertaken to generate the broadest possible input into this important work.

Revo's aim, subject to feedback, is to publish the new classification at its 2018 annual conference which takes place between 18 and 20 September in Manchester.

Revo CEO Ed Cooke said: "This is an important and influential piece of work, and as such we want to ensure that we get thorough input from as wide a range of industry professionals as possible. We have developed a proposed framework, which is based on a considered assessment of current thinking and research into this topic globally. We intend to refine this over the coming months to develop a credible and relevant classification that will be adopted by the UK's retail property industry."

CATEGORY	DEFINITION	TYPICAL SIZE	TYPICAL ANCHORS	CATCHMENT AREA/ DRIVE TIME
Regional (Schemes serving customers from a larger region/beyond town area)				
Super Regional Centre	Standalone "destination" shopping centre characterised by exceptional retail and leisure offer, serving large catchment area. Typically anchored by two (or more) department stores. Long dwell times, high footfall, typically used for monthly/quarterly shopping trips. High usage of F&B and leisure offer.	1m sq ft+	2+ dept. store	1hr+
Mid-Regional Centre	Principal retail offer in major city centre locations (top 25) or smaller standalone, with strong retail and leisure offer, serving large catchment area. Typically anchored by major department store with strong supporting fashion and well-used leisure offer. Typically used for weekly/monthly shopping trips.	750k sq ft +	1+ major stores	> 1 hr
Sub Regional Centre	Principal retail offer in large city/town centre locations (ranked 25-50), with strong anchor store and predominantly supporting fashion (wants) focus. Appropriate supporting leisure offer. Typically used for weekly shopping trips.	500k sq ft+	1 strong store	> 45 min
Local (Schemes oriented toward local customers)				
Community Centre	The principal shopping destination for the immediate catchment, used for daily /weekly shopping trips, with a strong representation from "needs" based retailers. Likely to be the commercial focus and foremost retailing pitch in the town. Highly likely to incorporate the town's main shoppers car park.	250k sq ft+		< 30 min
Neighbourhood Centre	A centre which constitutes a non-dominant part of the town's wider retail offer, or the dominant retail offer in a smaller catchment, playing an important but not necessary principal role in retailing in the area.	100-250k sq ft		< 15 min
Convenience Centre	Convenience centre - easily accessible, serving the daily needs of the direct local catchment. Highly likely to be underpinned by strong supermarket offer.	<100k sq ft	Typically supermarket	Immediate locality
Specialised-purpose centres				
Outlet Mall	Specialist centre that comprises manufacturers' and retailers' outlet stores, typically let on flexible/turnover leases, offering brand-name goods at discounted pricing.			
London Suburban Centre	Local catchment-focused town centre schemes, 200,000 sq ft+, predominant offer within densely populated area.			
Transport Hub	Retail in public transport networks: airports, railway stations, tube stations			

COMPETITION IS KEY

As leisure continues its integration into malls, what's next in the world of competitive socialising?

From bowling alleys and bingo halls, to pub games like darts and pool, to multiplayer video games, the concept of competitive socialising is nothing new. People like to have an excuse to come together and these activities give them a viable reason to do so.

In the past few years there has been something of a renaissance in competitive leisure in the commercial market, with a notable rise in the number of escape rooms, trampoline parks, climbing walls, and table tennis halls. There is definitely a growing desire for fun, the question is what will be the next trend to sate this consumer desire?

At the forefront of innovation in the sector is Adam Breeden, who co-founded boutique bowling alley All Star Lanes befor launching founder of Social Entertainment Ventures. SEV has brought to the market a number of socialising concepts including: table tennis concepts Bounce and Ace Bounce; cutting-edge mini golf phenomenon Puttshack; social darts concept Flight Club and, coming to the market next year, Hijingo!, an update on the traditional bingo format.

Format wise, each of SEV's creations brings together the experience of going to a restaurant-bar and doing an easy-to-pick-up activity. Bowling, darts, mini golf and table tennis are all relatively straightforward concepts that require little explanation before you can get going with them, which is ideal in a venue that also promotes alcohol consumption.

The point of each venture is to create a unique selling point that will allow the venue to compete with other F&B businesses. In an interview with The Soulmate Blog, Breeden said: "The thing with Bounce and concepts like it such as All Star Lanes and Flight Club is that if you have a choice of going to a great bar or restaurant, or you can go to the same great bar or restaurant but included in the experience is this incredible sociable activity, why wouldn't you opt for the one with the fun activity?"

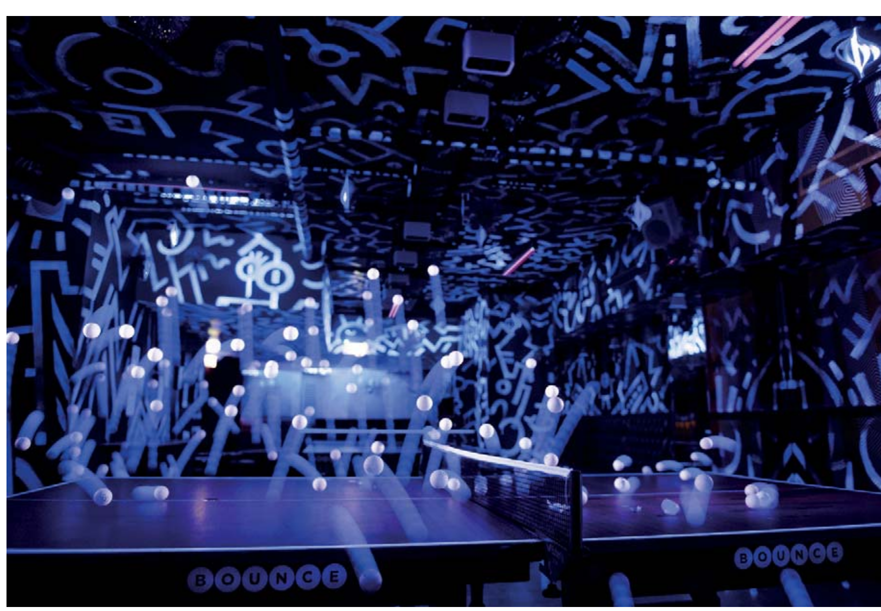
Bowling is no new concept, and the boutique offering All Star Lanes has been around for over a decade. Since its inception, the brand grew to five sites before the lull set in and any hype died down, with the business struggling to grow any further. In the past few years, it saw some restructuring and shifted its focus to target corporate events and offer a higher-end menu, and has now set the goal of expanding and opening more venues across the country.

Darts has long been a pub-game favourite, and Flight Club goes that one step further to create a more structured, technologically advanced take on the basic throwing game. The game combines technology and video game scoring, taking a two-player game up to as many as a 400-player game. The playing area has an intuitively controlled touch screen where you enter your name and take a selfie, before choosing one of several game options. There is a screen above the board which uses bespoke technology that keeps track of the score and tell players who is up next.

Puttshack has reinvented the mini golf market, bringing it indoors to the bar and restaurant scene and adding a bit of technology to breathe life into the experience. It has unique Trackball technology which, in short, means that each ball knows which player it belongs to, tracks how many times it has been hit, how far it has moved, matches it against a player's previous visits, and above all keeps a track of the scores, removing the risk of cheating and the need for scorecards, leaving players with a free hand.

Another mini golf concept, Junkyard Golf, recently announced its new permanent home at Wesgate shopping centre in Oxford, following the success of its Manchester and London sites. The Oxford location will host three new themed courses fresh from the scrapyard and five cocktail bars providing a pitstop for players.

Originally a nine-hole course made up of random finds, ebay purchases and charity shop finds, the wonky, thrown-together concept proved an overnight success



back in 2015, and comes to Westgate Social, a new food and leisure experience within the centre, this October.

Chris Legh, one of the founders of Junkyard Golf Club said: "Junkyard is a completely different kind of night out and we can't wait to bring it to the brand new Westgate. It's the ideal venue for us and our location as the anchor of the Westgate Social positions us alongside some of the most exciting new food outlets in the UK. We'll be installing three brand-new, wacky and immersive nine-hole courses, all supported by plenty of bars. With over 10,000 sq ft to play with, look out for reclaimed and re-purposed installations, slides, vintage cars, speed boats and the UV and jungle madness that has made our venues famous. Avoid the scary clowns though!"

Table tennis has been a big hit with the public, with ping-pong bars opening up and down the country. Breeden stepped down as CEO of All Star Lanes to focus on the SEV table tennis brand, Bounce, recognising its potential, saying in his interview with The Soulmate Blog: "There doesn't seem to be any kind of group social environment that doesn't work around a ping-pong table. We've had emails from people who've had first dates here. Once we realised this we've done specific dating events and it's worked really well. On certain nights of the year we'll do parties with a theme, such as for Christmas or Halloween. We get group dates as well.

"One of the premium offers at Bounce is having a games maker, where you can have a host who organises your group through tournaments and entertainment. On Friday nights, we have the challenge table for the venue at large, so it's like one big party where people who don't know each other come together.

"It really shows the social magic of how table tennis can bring people together. There's not many places where you can go out in London and be thrown in the mix with a whole load of people you don't know, all rubbing shoulders and engaging in an activity where you can meet people and engage in conversations and winks across the table in a genuine fun experience. It doesn't even have to be alcohol-fuelled. With Bounce, a lot of people come who have never played ping-pong and are really there for the whole experience."

Next up from Breeden and SEV, set to arrive in the leisure market early next year, is Hijingo!, a new bingo concept in partnership with Rebel Bingo creator James Gordon. Gordon started running bingo nights in 2006 and transformed them from small church hall events in Exmouth Market to regular events in venues of 1,000 capacity, across UK cities and popular bingo franchises in Spain, Portugal, Beijing and America.

The percentage of UK bingo players that has dramatically increased in recent years, according to uk-bingo.net. The proportion of players that are under 45 years of age has increased from 46 per cent to 62 per cent in the last decade, with players between the ages of 18 and 24 now making up 700,000 of the 3.5 million players in Britain. Hijingo! aims to capture the growing generation of young bingo players.

The venture, much like Bounce, Flight Club, All Star Lanes and Puttshack looks to get rid of the sticky-floored, blindingly lit, cheap-feeling, pensioner-filled stereotype surrounding bingo halls and creating an exciting, stylish, luxurious venue for the millennial generation. SEV plans to unveil 20 venues over a five-year expansion period, mirroring the fast roll out currently underway for the company's Puttshack concept, which arrived in Westfield London's White City development in June.

Gordon says of the partnership with SEV: "Hijingo! is the culmination of my ten years of research, development and operation in the world of bingo, working with my own brands across the globe, as well as leading British bingo brands. I couldn't have dreamed of a better partner to collaborate with than Adam and the Social Entertainment Ventures team – Hijingo! is going to completely super-charge the billion-dollar British bingo market."

The adult socialising market has long been dominated by restaurants, bars, and clubbing, but there has been a dramatic decline in the number of night-club venues in the UK over the last decade, indicating that people are looking for other ways to spend their money that don't involve staying out until three in the morning. Creating spaces that bring together F&B and leisure is the way forward for the industry. Also, it creates a nice place to have a bit of food and drink until your booked slot is ready rather than the customer going elsewhere.

While each offering tends towards a more adult demographic, they all still prove popular among family audiences, with some of the venues offering special offers for kids and families on certain days and at certain times, leaving it open to every demographic and potential customer.

Their common point of bringing together a quality dining offer and a group activity makes sense for one basic reason: getting people to stay. If you just offer food or drink or one round of a game then people are not going to stick around long after they're finished but giving them a reason to stay a bit longer and spend a bit more money is a no brainer.

These operations come with the benefit of bringing in a large pre-booked market, bringing in footfall rather than relying on it. Their design also generates the 'insta-worthy' buzz and experience that consumers increasingly demand.

There is likely to be some hesitancy for the uptake of the latest competitive socialising trend, given shopping centres have long rested on the laurels of long-term leases, while untried and untested concepts don't have the experience to back up their potential for long-term success.

The market is also likely to become saturated quickly with everyone trying to cash in on the latest trend, and so the ability to evolve is key. Taking an old favourite and reinventing it just enough to breathe some life into it and inspire a new generation is, for now, the way forward.

Breeden is unconcerned about oversaturation, saying of Bounce when it opened near to the Brick Lane location for All Star Lanes: "There's strength in numbers. There were concerns that Bounce would erode All Star's business, but sales surged up there as soon as we opened. All Star Lanes, Bounce and Flight Club are all competing. But together they will be building a hospitality niche market that will compete against the hospitality sector at large. I would be much more concerned if I was a straight bar or restaurant operation with no USP."

As F&B and leisure continues its integration into malls, landlords should consider these outside-the-box concept for their larger vacant units, creating a forward thinking opportunity to retain an exciting anchor tenant that compliments the existing tenant mix and increases footfall. It may be a case of initially offering shorter leases to these new, innovative brands and local traders to keep the scheme ahead of the game.

GAME LOGS ON

The rise in online and digital sales of gaming has put video game retailers such as Game in a difficult position as gamers no longer need to go instore or queue up for midnight launches to buy the latest releases. Enter Belong: an instore social gaming-arena concept, dedicated to consumers playing together, throwing parties and trialling new products, and a place to accommodate and broadcast the phenomenally huge and profitable eSports tournament market.

The concept charges consumers to use the machines, with Belong venues offering consoles and computers with designated slots for gamers to play in. Units are separate to the Game store, offering dedicated spaces rather than cramming them in corners and between shelf units. The competitive socialising concept is still in its infancy, but the brand looks to open 100 new Belong locations over the next three years.

Game CEO Martyn Gibbs put his confidence behind the development saying in an interview about the Belong concept: "You can choose to go to the cinema, or you could choose to come and play games with your friends in our arena. It is an absolute gaming experience that is replicant of Ten Pin Bowling, it is replicant of a ball park. It is a leisure activity.

"When I went up to Trafford [the brand's initial Manchester store] the week after launch, the Arena was packed, we were full, and I sat and talked to some of the participants and I asked them: 'You could be sitting at home, why are you here with us?' And the guy looked at me, smiled and said: "I can't sit next to my mate at home, and I don't have this spec of PC." So it is really building social activity."

"Where we have Belong, we see a far improved retail performance as well," he added. "So the sooner that we can add more Belongs, then we will add market share within those locations. We are positioning ourselves now to make sure we're aiding and supporting over the next three to five years, rather than market share in one half."

THE RISE OF THE VEGAN

Veganism is on the rise and the F&B industry needs to cater for the growing number of shoppers who avoid meat and dairy products

Meat free diets have long been the butt of the joke for a predominantly omnivorous nation, where vegans and vegetarians are regularly teased with remarks like "plants have feelings too", "oh, so you're a hipster" and the simple, ever cutting "but bacon!". If you ask the average, everyday meat eater what they think of vegans it's usually met with a comment about how vegans never shut up about the fact that they're vegan. If this latter stereotype is true, then it's certainly, finally, having an impact on the consumer consciousness.

"Easy access to information has made people increasingly aware of the benefits of healthy eating," says Leo Feldman, partner at Shelley Sandzer. "Social media particularly has made this content more widespread and significantly influenced the lifestyle of the younger generations.

"The obvious impact of environmental issues from the meat and dairy industries resonates with this generation who are more prepared to change the way they consume. Veganism has moved from being outcast to somewhat glamourized and restaurants are jumping on this trend and reaping the benefits."

When Veganuary – a pledge to live a vegan lifestyle for the entire month of January – launched in 2014, around 3,300 people signed up. Jump to 2018 and the official sign up number is up to 168,000, and this is just the number of official sign-ups, the actual figure likely to be higher. The most recent study denoting the number of vegans in the UK was reported as being over half a million, and the number of vegetarians at more than double this. If you speak enough about something then people are going to start paying attention, and so should landlords and leasing agents.

"Though there are few solely vegan operators," Feldman continues, "there are more today than ever been before and we are seeing a sharp increase. The vast majority of restaurants are now developing vegan dishes to add to their menus, reacting to and keeping up with this trend."

Lendlease and Invesco Real Estate, the global real estate investment manager, recently announced that a brand-new vegan restaurant concept, When Polly Met Fergie, is to open its debut site at Queensgate, Peterborough this month. The 1,500-sq ft café style restaurant will offer delicious plant-based cuisine with a focus on sustainable, healthy produce including freshly made pasta and sauces made daily. The 40-cover café-style restaurant will provide an entirely vegan plant-based menu, in a relaxed and welcoming and bright setting including casual dining alongside a relaxed cocktail lounge jazz bar.

Alastair Norwell, founder and owner of When Polly Met Fergie, a play on the film title When Harry Met Sally replacing the characters name with those of his dogs, says that the decision to open a vegan restaurant came after a number of years of being vegan and looking for places that served good vegan food.

He says: "While it has a few places that offer a couple of vegan options, it made sense to open When Polly Met Fergie in a growing city like Peterborough, and to be able to be part of Queensgate shopping centre with the future expansions plans taking place including the increased leisure side of things.

"I think over the last few decades people have become more conscious of where their food comes from, with going organic, using local people etc, this for a lot of people has been a natural progression of taking responsibility for where their food comes from, and what they are eating, and taking the step to becoming more vegan, and with this it has become very fashionable as well. But food is about bringing people together, and if that's vegan food then that's great."

When asked how they would draw in the non-vegan crowds, Feldman says it will be a simple matter of building a good reputation: "Our main aim in this concept as we see it, is to have meat eaters eat and drink with us and leave not feeling like they have missed out on anything."

And on the future of the brand, he says their aim is to expand into a few regional locations: "We have already been approached by companies and people to take a second site to them, which has been massively exciting for us. However, we are very clear we need to nail the Queensgate site first, covering all bases and make sure we have a strong team in place so that quality or standards don't drop if we are not here. Once these have been achieved then we will start looking at a second site."

MANGING MULTIPLE THREATS

Shopping centres face a multi-faceted range of threats from theft to fraud to terrorism. How is technology helping centres juggle competing priorities?

The success of a shopping mall is founded in inviting anyone and everyone onto its premises. There is no real screening process for shoppers and creating one would quickly reduce footfall. Most shoppers faced with security checkpoints before they even enter a centre or store are likely to be put off and go elsewhere, and so centres must remain open to all in order to continue trading successfully.

Security needs to be both unobtrusive and highly effective. Deterrents are the most prevalent way to prevent low-level crimes such as shoplifting and vandalism. This usually comes in the form of security teams on patrol, closed circuit television cameras, security tags on goods, and warning signage.

Most centres will have all these in place and more, and yet shoplifting remains one of the industry's biggest financial burdens, accounting for more than £500m of the £700m in direct cost incurred from retail crime between March 2016 and April 2017, according to research carried out by online marketplace OnBuy.

The investigation found that from April 2017 to March 2018, the rate of shoplifting has increased by 4 per cent, with 378,725 reported incidences of shoplifting – shoplifting being defined as 'theft from shops or stalls' – in the UK during this period.

Cas Paton, managing director at OnBuy, says of the findings: "With the overall number of shoplifting incidents increasing from the previous year, it's a crime which is financially burdening retailers. It's unfortunate because many owners spend a lot of time, money and energy ensuring all aspects of their operations are running effectively and efficiently. While shoplifting may seem difficult to prevent, there are certain cost-effective precautions retailers can take to deter shoplifters from targeting them. Precautions such as training employees to identify the behaviours associated with shoplifters and appropriate signage to warn potential offenders about the seriousness of the matter."

The big name brands have the financial backing to take matters into their own hands, with most of their products having some kind of security tagging, and many bigger units hiring in-store security staff. The independent and small business owners, on the other hand, lack the resources to protect themselves and are far more vulnerable to theft. It is they who will rely more heavily on the security provided by the centre which houses them.

Working with independent and pop up retailers is important on every level, and making sure they feel safe and secure in their business will make them feel like welcome part of the centre. Paton says it is beneficial to make sure they know basic, inexpensive ways to reduce and prevent shoplifting, such as: making sure their stock and inventory are lined to easily spot things going missing; having a strong employee presence to make potential shoplifters feel watched; recognising suspicious behaviour such as loitering in specific areas or being overly attentive when looking at the cashier; and finally making sure that there are signs to inform them that shoplifters will be prosecuted.

It can also be beneficial to continue communication with tenants and constantly remind them of security protocols, making sure they know what action to take in an instance of theft or vandalism, keeping them up to date with information about security patrols and any new developments in and around the centre that could impact their business. Simply having a strong security team presence that checks in with retailers on a regular basis can promote feelings of safety and security among tenants.

HOSTILE VEHICLE MITIGATION

Shoplifting is perhaps the most prevalent and costly crime in retail, but there are far bigger threats that face the shopping centres. Due to their level of footfall and their exposed open nature, malls are potential terrorist targets. Retail site owners, planners and managers have a duty of care to ensure their shopping centre has measures in place to mitigate the effects of vehicle attacks.

James Myatt, managing director at Townscape Products, a company with over 40 years of experience providing counter terror systems for towns and cities in the UK and overseas, speaks about the latest developments in hostile vehicle mitigation (HVM) and how shopping centre managers, developers and planners can protect visitors from an evolving and growing threat.

"In recent years," Myatt says, "there has been an increase in the number of incidences of vehicles being used as an offensive weapon with Vehicle as Weapon (VAW) attacks most often targeting major European cities with dense populations and familiar landmarks.

"The terrorist organisations and extremists responsible have identified weaknesses in the infrastructure of these cities – typically, open pedestrian spaces that leave people vulnerable to VAW attacks.

"This type of attack requires little planning and no training by the perpetrators and the consequences can be catastrophic as seen in London, Nice and Berlin."

This, says Myatt, is where Hostile Vehicle Mitigation, or HVM, comes in. HVM is a system of permanent or temporary perimeter security products designed to defend people or property from vehicular attacks.

HVM systems make open spaces, assets and activities safer by managing vehicle access and approach. This is done by the strategic placement of products that block or restrict access of vehicles to pedestrianised areas.

The systems are designed and manufactured from robust materials– including counter-terror blocks, PAS 68 bollards, PAS 68 bollards, PAS 68 vehicle barriers or planters – which Myatt says can stop a vehicle in its tracks.

Most HVM systems are installed near busy pedestrian areas or around the perimeter of buildings that experience significant footfall, such as a busy shopping centre. Because of their positioning, Myatt enforces that rather than being obvious, eyesore deterrents, these defences should be inconspicuous and in keeping with the centre aesthetic.

"Townscape has global experience working with multiple sectors and can design and manufacture to a clients' very varied needs," says Myatt. "Covert HVM is designed to be inconspicuous and go under the radar of the average passer-by. Although it is virtually unnoticed, it provides protection without visually impairing the landscape. Aesthetic design and clever use of materials and surfaces can make products look inviting – often enhancing their surroundings and even increasing the duration of stay of visitors."

These hidden barriers can come in the form of seats, planters, litter bins or even cycle racks, all of which can be produced to PAS 68 specifications. Myatt explains that with covert systems, a range of products are often used to break up the urban environment to make it less penetrable. Something as inconspicuous and functional as a cycle rack can serve the purpose of stopping a vehicle from gaining momentum.

Covert systems are particularly suited to public facilities, such as shopping centres and areas where pedestrians need to be kept safe as they go about their day-to-day business without constantly reminding them of the potential risks of doing so.

Conversely, there is the option of overt HVM, designed to act as a blatant and imposing visual deterrent to potential assailants. Often marked with high-visibility black and yellow hazard lines, their purpose is to boldly demarcate pedestrian zones and discourage attackers by clearly displaying the fact that the area is protected against vehicle attacks.

It is a sad truth that such measures are necessary for places as innocent as shopping centres, and though the likelihood of an attack is incredibly slim, it is always better to be safe than sorry. Myatt says: "Unfortunately, we live in an age where HVM is now a mandatory consideration. It has long been considered an irrelevance by planners, specifiers and architects.

"Misconceptions about the image and cost of security products have meant that their importance has often been overlooked.

"Options now exist that allow shopping centres to be protected without destroying their aesthetic and social merits and moreover keeping the lives of customers safe and reducing the risk of liabilities of the shopping centre management and investors."

TAILGATING

Another growing security concern for shopping centres is the act of tailgating, which is where access to restricted areas is gained through turnstile/speed gates by following closely behind the person in front. Iain Entwistle, product marketing manager at UK security product supplier Meesons AI, explains the problems that can arise as a result of security tailgating at shopping centres and how it can be prevented.

"Shopping centres have many different entrances and exits for customers, employees and delivery personnel, which can make it very difficult to monitor who is entering and leaving restricted areas," he says. "Unauthorised access to restricted areas, such as staff rooms, back offices, stockrooms and cash offices can pose a high security risk. Good security protocols coupled with an effective access control system, will therefore help reduce risk of unauthorised access and security threats.

Tailgating, which is where a person gains entry to a building or restricted area without presenting a valid security credential such as an ID card or badge, is one of the most common causes of unauthorised entry. It can occur at any entrance or exit and all buildings are vulnerable to this kind of breach. It is more common, and much easier, for an unauthorised person to gain access into a building or restricted area by closely following another person through an entrance, rather than duplicating security passes or hacking an IT system.

"In the majority of cases," Entwistle continues, "tailgating happens innocently and is carried out by authorised personnel unwittingly. For example, when someone follows a colleague through a security entrance without using their own pass, or when someone holds the door for another person, which people are inclined to do. In strict access controlled environments such as back offices in shopping centres, however, this can cause major problems as it allows would-be intruders to gain easy entrance into sensitive and restricted parts of the building.

He warns that, despite in most cases tailgating occurring innocently, in a shopping centre it can put the safety of thousands of people at risk, should an intruder with malicious intent enter a restricted area, pointing out that these areas are restricted for good reason.

"In some cases it could result in products or sensitive data being stolen, or even worse gaining unauthorised access to cash deposit safes or the entire shopping centre security system, including the alarm system and control room," he says.

It is for these reasons that a considerable amount of effort has gone into developing intelligent access control systems that prevent unauthorised access and tailgating. Many of the latest solutions work by only permitting one authorised person to enter or leave the building or restricted area at once using an intelligent physical barrier; or electronically by incorporating sensors that detect when an unauthorised person attempts to piggyback their way into the building.

There are a number of options on the market for centres. Security portals are ideal for preventing unauthorised access to restricted areas, such as cash offices. Portals are standalone air-lock units providing a high level of security and are very effective at preventing tailgating.

"They are a good choice where 24/7 unmanned access control is required," says Entwistle. "Our security portals incorporate APD (Anti Piggy Backing Device) which scans the portal with an ultrasonic sensor to ensure that only one person has entered. If more than one person is present in the portal, an alarm is triggered and the transit is denied. APD is therefore highly capable of detecting whether there is more than one user in the Portal at any one time."

For facilities that require a higher level of security, Entwistle recommends that alternative glazing is considered, including anti-vandal and bullet proof specification. For other buildings and facilities, he says it may be necessary to incorporate metal detectors into the portal: "Further peace of mind for specifiers and end users is available through physical approvals that ensure the delay within 'deter, detect, delay' to allow other security protocols to be actioned should a tailgating attempt escalate to a physical attack."

Entrance control solutions can also go beyond simple security purposes, providing an opportunity for centre managers to gain revenue from services such as bike storage or use of washrooms where shoppers pay a small fee to gain access to the facility.

Meesons' Speed Gates, for example, can be operated by coins, contactless card or NFC payments and are ideal for use in washroom areas. "Our EasyGate SPA, is an innovative 'Pay to Access' Speed Gate designed specifically for public accessed facilities," Entwistle tells. "The gate enables organisations to charge to use the facilities, day or night, ensuring only paid users and authorised personnel have access.

"Unauthorised entry through tailgating can cause serious issues in shopping centres. With the design of many entry control systems now integrating anti-tailgating measures, tackling this vulnerable physical interface with the outside world is now eminently achievable. In addition, security access systems can not only prevent theft from stockrooms, cash offices and staffrooms, but in some cases can also bring in additional revenue for shopping centres," Entwistle concludes.

WEB WAYFINDING

What should a shopping centre's website look like?

Websites are useful tools for any business, and though it should go without saying at this point, any consumer-facing business should have an up-to date website for their customers that allows easy navigation to anything and everything they might need. With rare exceptions, shopping centres around the country all have an online presence, some more active than others. Where many centres fall down is their inconsistent approach to online content, favouring some platforms over others seeing them as more impactful in reaching their shoppers.

Daniel Graham, director at OnBrand, Alexei Lee, head of social and PR at Fat Media and Alex Humphries, marketing manager for My Social Agency came together to answer the questions: why are websites so important and what should a shopping centre's website look like?

The first place people go for information is the internet, and they expect that once they have put their query into a search engine, their question will be answered almost instantaneously with the most relevant results being served to them.

"Websites are a must-have for any business in the modern age, and frankly, it's surprising how many either don't have one or haven't updated it since the early 2000's," says Humphries. "If your shopping centre isn't in the top four or five results, then how are people going to know about it? Of course, when it comes to brand awareness, there are other media which come into play, such as print advertising and PR, but the primary method is having a website."

What differentiates a website from a social media feed is the detail of information it has the power to give. While a Facebook page might be able to convey basic information, a website has the ability to go far deeper.

THE LANDING PAGE

So a person has searched for a shopping centre online, they click on the link to the dedicated website. What should they be seeing? "Essentially," says Graham, "a homepage should drive users deeper into the website.

"A landing page for a centre website needs to present a strong first impression because it's the first customer experience a shopper might have. On the landing page there should be paths for all journeys so that a user is only one click away from satisfying the needs of their visit to the website."

OnBrand recently conducted a survey of 1,000 people, asking them for the most common reasons they might visit a shopping centre's website. The top answers were: opening times, parking information, complaints sections, offers in the mall, details about the facilities, and units that are up for leasing. "If any of these are missing or hard to find then you run a high risk of losing that shopper," Graham says. "From the results of our research, we would say that prominently on the homepage should always be directions for how to get to the centre as well as the full address and postcode, plus trading hours."

With any landing page, it should have a specific, obvious purpose and be orderly, easy to navigate and nice to look at. If it is cluttered it makes it difficult for the user to find the information they are looking for. This can lead to them leaving the site altogether. The easiest way to do this is to present all the necessary sections under tabs that take you deeper into the site.

It should, according to Humphries, include a menu which is easy to navigate, logos of stores which are situated in the centre, the address, links to social media and internal links to useful content such as a map of the centre and a list of facilities. The home page is also an ideal place to put the opening hours of the centre.

FUNDAMENTAL FEATURES

"There are a number of key features you would expect to find on a shopping centre website," says Humphries, "these are: a list of shops and restaurants, a centre map, business opportunities, how to get there, and contact information."

The shops and restaurants are the main attraction for the centre and the website should have a prominent section that serves as a platform that provides all the necessary information a shopper might need before visiting, such as what brands are in the centre so that they can decide if they will visit, opening times for each store, and where in the centre they are located.

A centre map is a useful tool to help shoppers navigate to their favourite stores, especially important in a larger centre and for people looking to make a quick trip in and out for a mission shopping experience picking up a specific item or collecting an order they made online.

Explaining how to get there is also important for people coming in from out-of-town or who are arriving by car. Letting people know opening times, transport links, walking directions, details about the car park and anything else they might need to plan a visit should all be easy to find on the website.

And finally, for disabled shoppers who are among the most likely to research a shopping centre online before making a trip, an area with information about disabled access and the facilities, such as bathrooms and lifts, that cater for their needs. Many disabled shoppers are likely to avoid a centre if this information is not available.

Those are the main features that centre websites should all provide, but there is always the scope for a website to do more. As Graham says, one of the points of a website should be to make you go deeper into what it has to offer.

One feature that Graham and OnBrand have found to be hugely successful has been bringing offers to the homepage. "For our clients we've got a widget that can be inserted into the homepage that shows all the latest offers in the centre," he explains. "On sites where we've showcased offers like this there has been a huge increase of 400 per cent in click-throughs, engagement and repeat visits."

Fat Media manages the website for the Carlisle shopping centre, The Lanes, and Alexei Lee, the company's head of social and PR, says that a popular feature on the centre's site has been the stylist blog. "The regularly updated blog contains fashion ideas and tips for people of all ages and now it is one of the most visited sections on the website. Events on the website have also proven popular as have competitions, another excellent feature which helps drive traffic to not only the website, but to the shopping centre as well."

And Humphries champions the benefits of having a careers page which promotes job vacancies within the centre: "It's just another way to drive traffic to the website, as you have a chance of ranking for terms such as 'retail jobs near me' or 'jobs in TOWN/CITY'. This is not just the case for organic search, as pages such as these also provide you with landing pages for paid search (PPC) campaigns, targeting similar phrases."

AVOIDING OVERCOMPLICATION

The survey conducted by OnBrand showed that 55 per cent of users would expect a centre with a poor website to be equally as poor in real life, highlighting the fact that a centre's website is an extension of its brand, and so it is important to maintain a strong online presence. That said, what things should centre websites avoid doing?

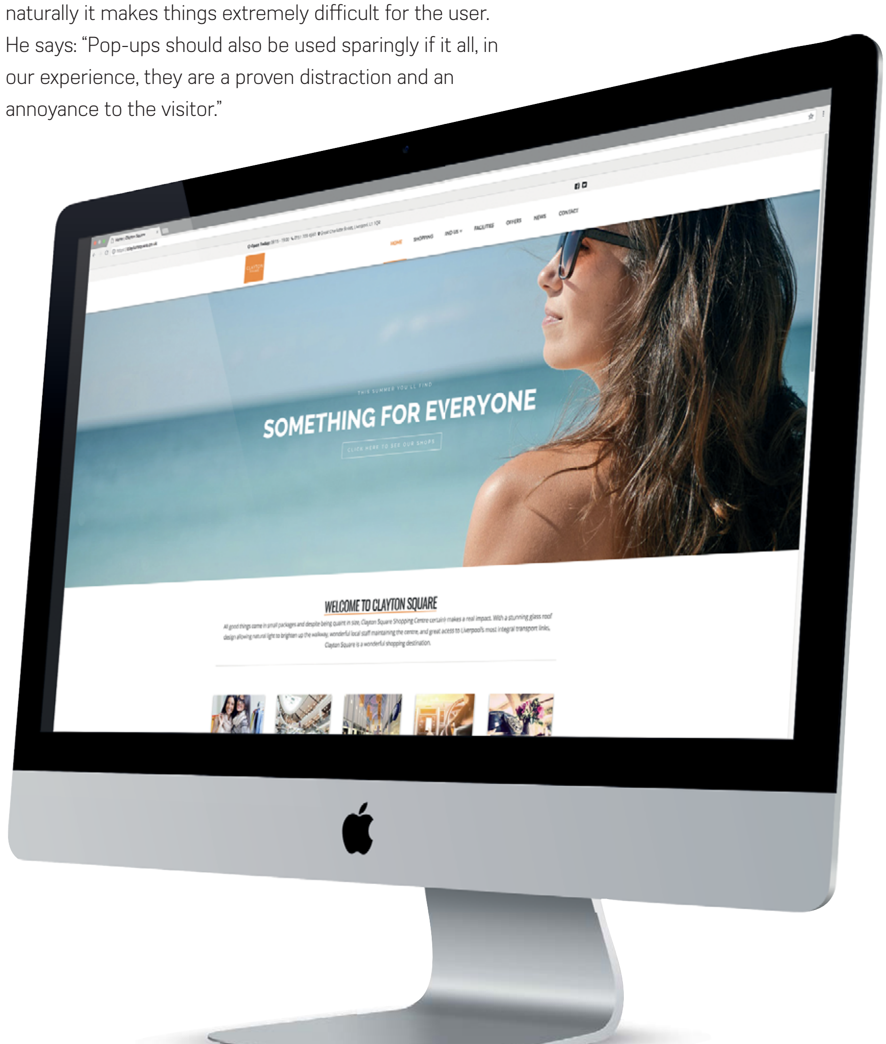
HOW PEOPLE ACCESS SHOPPING CENTRE WEBSITES?

Mobile phone	74%
Laptop	53%
Desktop computer	24%
Tablet	13%

[source: OnBrand Survey]

"There are three things that a centre's website should avoid: increasing the amount of effort a person needs to find what they're looking for; too much endless scrolling; and most importantly it not being mobile compatible" says OnBrand's Graham, whose survey showed that mobile was the most likely way that users would access a centre's website. He adds: "We are all on our phones when we're in a shopping centre, usually product checking or price checking so it's important to have an easily accessible, mobile friendly website."

Lee agrees, adding that If it isn't easy to navigate, then naturally it makes things extremely difficult for the user. He says: "Pop-ups should also be used sparingly if it all, in our experience, they are a proven distraction and an annoyance to the visitor."



WHY PEOPLE VISIT A CENTRE WEBSITE?

Opening Hours	58%
Store info	50%
To find offers	39%
Car park info	18%
Centre info	16%
Facilities details	13%
I never knew they existed	8%
Event information	8%
Other	3%

[source: OnBrand Survey]

Humphries says that one of the biggest problems with websites of any kind are lag times when it comes to loading a page, due to overloaded, unnecessarily complex interface, and that visual appeal can do more harm than good.

"A web designer is usually a creative type of person, and so will often add elements to your website which although makes it visually appealing, may actually slow it down, or make it overly complex for the average user. It is important to think of your primary audience, and how 'tech-savvy' they are before putting on unnecessary 'bells and whistles'.

"Images can be a big issue for websites. No imagery, and the user finds the website dull and boring, basic stock imagery, and the user feels like they are not having a personal experience, and too much imagery and they're not getting the information they need. Add in issues around the size of the image files, and how that contributes to site load speed, and you can find yourself in a minefield"

All of this, he says, can contribute to elongated waiting time for a site to load, warning of the lack of patience amongst consumers: "Slow load speed is one of the primary factors in why a user bounces from a website, and statistics show that 40 per cent of people will abandon a page which takes three or more seconds to load.

A shopping centre is itself a brand, and so having a poor website as the OnBrand research indicates, reflects poorly on the centre's brand. The branding is how the shopper remembers you and helps distinguish the centre from the retail outlets it plays home to.

Lee says that branding is more than how a brand looks, but is about how it feels, how it sounds and how it creates buzz amongst its target audience.

"Every business, no matter who they are or what sector they operate in, should have brand guidelines which they follow religiously," he explains. "This usually includes details around the logo, pantone colours, fonts and should also provide an introduction to the brand. However, in order to get your branding right, you must conduct research into your audience and what they respond to.

"For shopping centres, ensuring your branding is relevant is not just important in terms of how it appeals to your B2C audience (your visitors), but it's also how it speaks to the businesses within the centre, or any businesses who are looking at a unit within it."

DIGITAL MARKETING

Websites are important tools. All centres should have a website the provides the wealth of information a shopper might need, and whilst social media is a good marketing tool to promote events, sales, and to direct followers to the website, a website's reach goes far beyond what a Facebook page or Twitter account can do, the only thing it can't do is attract visitors just by simply existing, it has to have the social media accounts and search engine optimisation tools to back it up

Graham says that social media should never replace a website, that there is a place for all online channels, and a centre should never restrict its potential reach: "People operate on different channels and they need to be able to find you on all of them. People who use social media will find you on social media. People who browse the internet will look for your website. If you don't cover all your bases then you're missing a segment of your audience."

Lee believes that whilst social media plays a pivotal role for shopping centres in generating traffic, he says that even though it is constantly evolving it should never replace a website, pulling the example of a store directory: "It simply cannot be uploaded to a Snapchat or Twitter profile," he says. "Search and go is still a popular mechanism when looking for information, this is the quickest way compared to a social media profile where regular updates are posted daily, making specific information difficult to find."

He does, however, champion the many promotional and marketing benefits that social media provides, suggesting that while they both exist online they both serve different parts of the online community.

He says: "Shopping centres will have a core regional customer base along with locals to target. Social networks offer this and can prove a very effective way to reach the right people with the correct content. Local influencers also help build trust with the local audience and they can help build the rapport with local visitors and offer a true opinion of a shopping experience.

"For two years, we've worked with local influencers for the Lanes in Carlisle and it really has paid off. The centre has a packed schedule of regular events to attract people in and around the region. Not only that, we help them get online exposure for these events by inviting influencers to create content about their experiences, as well as helping the Lanes to produce branded content that can be used on social media."

The final string to the digital marketing strategy bow is email marketing. It is a vital, proven method that, once people to sign up to your newsletter, promotes visits further down the line. Thanks to smart phones, emails are delivered directly into people's pockets, communicating in a more personal way about the goings on in their favourite shopping centre.

Humphries says that email marketing has proven time and time again that it can be the most effective channel for ROI. "As of 2017 for every £1 spent on email, on average it returned £38," he says. "Again, the results we produced for the Lanes were nothing short of superb."

Lee gives some best practice tips for email marketing, saying that keeping it tight, mobile friendly, and delivering it at a good time are all fundamental to getting users to engage. He says "Target them when they are most active such as when they wake up, when they're commuting, or in the evenings when they are scrolling through their social media channels while watching TV. If your email takes too long to open or is formatted wrongly for these devices, then you will likely find that recipients unsubscribe from the list, meaning you won't be able to contact them again."

As important as newsletters, social media and websites are, they, at their core, exist to market a centre to potential customers, and must in every way embody the brand of the shopping centre in a positive way, providing any information a visitor might need in less than two clicks. A digital presence is expected in the modern world, and so making sure a centre is presented well across every online avenue is more important than ever.

WHAT WOULD A POOR CENTRE WEBSITE MAKE YOU FEEL ABOUT THE CENTRE?

It will just be as poor inside	55%
It doesn't care about its shoppers	50%
It's an uninspiring place	27%
Other	3%

[source: OnBrand Survey]

PLAY AS YOU SHOP

intu accelerates tech trials with play as you shop video games

Shopping centre owner intu is piloting new technology that lets people compete in giant video games while they shop as part of its start-up incubator programme, intu Accelerate.

Start-up business Rhythm is working with intu to test how massive gaming experiences in shopping centres could drive up footfall, attract younger shoppers and benefit retailers.

Its product, Piing, creates multiplayer games for big screens that up to 200 people can take part in at a time using their mobile phones as controllers.

Hundreds of shoppers tried the technology for the first time at intu Merry Hill last month, taking part in a series of games that included a dune-buggy race, a multiplayer game of tennis and a general knowledge quiz.

intu Merry Hill's retailers and restaurateurs got behind the initiative by offering prizes and intu is exploring brand sponsorship opportunities for future trials.

Six more initiatives are currently being trialled by intu in partnership with start-up businesses as part of the company's drive to introduce more game-changing technologies to the retail sector. intu became the first shopping centre landlord to introduce its own shoppable visual search tool this year, which matches up pictures with products from more than 500 retailers selling on intu.co.uk, and has run a succession of virtual reality and augmented reality experiences in its centres.

David Fischel, intu chief executive, said: "We're continuing to explore how technology could offer intu customers an even better experience and create new opportunities for our retailers to thrive. intu Accelerate is empowering our business to find more ways to innovate the retail industry in partnership with some of the smartest start-up companies out there.

"Hundreds of shoppers can take part in any one of these games at a time and this created a real sense of excitement among shoppers when we trialled the technology at intu Merry Hill. Retailers were also quick to get behind the initiative by providing plenty of prizes for those taking part so we think this is something we can build on with future trials."

Last year's intu Accelerate fast-tracked trials of retail robots, queue jumping apps, and online personal shoppers into its shopping centres and online at intu.co.uk and intu has now signed up seven more start-ups who are testing their ideas to shape the future of retail. The programme is run in partnership with innovation specialists L Marks.

THE OTHER COMPANIES TAKING PART IN INTU ACCELERATE THIS YEAR ARE:

CarTap – provides secure access to vehicles to deliver shoppers' bags straight to their cars
Grid Edge – saves money and reduces carbon emissions by using artificial intelligence to control energy usage
WeFiFo – an online marketplace that connects home cooks and chefs with paying guests
Greendeck – uses AI to help fashion brands and retailers automatically classify products into categories and attributes
Yosh.Ai – a virtual assistant that provides a personal shopping service
Roialty – hi-tech marketing platform that turns anonymous social media data into valuable customer insight

AHEAD OF THE GAME

Is the UK retail industry falling behind its international counterparts? asks Coniq's Sean Curtis

In a challenging period for UK retail which has seen yet more well-known brands disappear from our high streets and shopping centres, I was surprised to read the findings in the recent whitepaper by Retail Week and Yardi. While retailers want more information from shopping centre owners, much of the data they say they are missing from landlords is already available and I couldn't help asking myself whether the UK is in danger of falling behind its international counterparts.

The well-written "Great Expectations: Unlocking shopping centre data to meet retailers' needs" is based on interviews with 50 retail directors responsible for store portfolios, each representing £50m to £10bn turnover companies.

The key findings state that retailers believe they are fully utilising the data that is currently available from shopping centres (74 per cent) but there is a clear outcry for owners to "provide more information such as daily footfall figures, average customer spend across the shopping mall and dwell time". It comes as a surprise to me for two reasons:

- All of this data is readily available
- Many European shopping centre operators are already utilising this data regularly, either on a daily basis or in some cases, throughout the day in real time.

So the question for me is "Are UK shopping centres challenging themselves enough in what data they provide to retailers or do retailers need to rethink what data they need from the centre operator?"

Take average customer spend, something Coniq helps many retail destinations understand: in Europe we provide app solutions where the centre team can check this and average transaction value (ATV) in real time, as well as generating centre reports that they can share with retailers.

The whitepaper found that 70 per cent of retailers set KPIs with shopping centre managers which is applaudable, however the current data that they have access to means any KPIs are unlikely to be linked to ROI – at a time when bricks and mortar needs to fight back against the online onslaught.

Out of the respondents, 66 per cent receive data on customer profiles and 60 per cent receive data on shopping centre marketing spend – it would be fair to question the evaluation of any marketing ROI without transactional data. At best, it will be ambiguous if not linked to customer spend and definitely inferior to how the same retailer measures its online performance.

In addition, while customer profiles are useful, it is the segmentation of the data to create tailored, measurable content that is the key. Technology exists not only to segment customers based on their value to a mall, their shopping behaviours – or both – but then to also serve them automated, relevant content based on a transaction. Much as Amazon showcases with "customers who bought this also purchased these…", the same experience is now possible in a bricks and mortar ecosystem which tracks transactional activity.

Shopping centres need to help retailers' stores behave more like their online channel. Sharing actionable data with retailers will engage them in the overall performance of the mall as well as allow for "more comprehensive performance measures" to be set (a key requirement for the retailers surveyed).

How much would brands value the opportunity to know that a shopping centre customer has just made a purchase in Retailer A and that the same customer also regularly shops with Retailer B? One might argue that the chance to serve an automated offer at that precise moment is more valuable than paying for an ad online when someone may simply be at home surfing the web – this is exactly the conversation we had repeatedly at ICSC Recon in the USA just a few weeks ago where this scenario is very much the goal.

Other performance measures are likely to include greater data collaboration, for example, we are working with a mall operator and a footfall analytics company to explore how combining our data can improve that centre's performance. True footfall conversion combined with spend conversion and ATV creates a data-set that retailers and leasing directors alike would value.

Or take ANPR – linked to a CRM program, this API collects data that allows the centre to identify its best customers as they arrive – not dissimilar to how retailers use in-store wi-fi to identify their customers.

Data provides physical retailers and shopping centres with the opportunity to fight back by harnessing the best elements of online shopping and combining them with retail experience. Call me a romantic but if the retailers and mall owners set out to redefine what data is important and how it should be used, I believe the results might lead to a shift in mindset that will improve both bottom line performance and promote further collaboration.

Community malls remain resilient

The rise of online shopping has had less impact on community malls than on other forms of shopping centre, according to new research from Ellandi and Savills. The research found that fewer retailers in community malls have transactional websites compared to regional malls. However, click & collect has become a key driver of footfall to community malls, with 13 per cent of visitors using click & collect services.

The report, Retail Revolutions: Exploring the Impact of E-Commerce on Local Physical Retailing, highlights that despite challenges from rising ecommerce, increased costs, structural shifts, several CVAs, and the rhetoric that accompanies these issues, there are positive stories in the retail sector. Online retail continues to dominate the growth story, but it is becoming increasingly clear that for many brands bricks and mortar stores remain key outlets for customers to interact with their omnichannel offer.

While no sector is entirely immune from challenges brought on by ecommerce, Ellandi and Savills say that community shopping centres will continue to be occupied by a mix of retailers for whom ecommerce is a sideshow. Online trade accounts for only 12 per cent of the UK sales of the top 100 community shopping centre brands compared to 20 per cent in regional malls, according to the Savills/Ellandi report. While 68 per cent of the top 10 brands present in community shopping centres have an internet offer, compared to 80 per cent of those in regional malls, community centres tend to focus on goods and services that are not as readily available online, thereby proving more resistant against moves towards online retailing.

Tom Whittington, retail research director at Savills, said: "With a greater proportion of retailers with no online offer, or with online accounting for a low proportion of their UK sales, the stores in community shopping centres remain a core and relevant part of retailers' businesses and one of the best opportunities for them to engage with customers. Ecommerce may not prove to be the major threat anticipated for retailers in these schemes as many of these brands offer a distinct point of difference, with in-store service, experience and convenience being paramount."

Isabelle Hease, head of research and analytics at Ellandi, added: "Click & collect has a natural synergy with the convenience of local high street and shopping centre locations, giving shoppers a purpose to visit. According to our research, collection services are currently used by 13 per cent of visitors to community shopping centres and are highly effective at bringing shoppers in store and increasing basket spend, with those who use them averaging a £40 basket spend, versus £29 for those who don't."

Retail parks continue to perform

The latest edition of Trevor Wood Associates' comprehensive survey of the UK out-of-town market, The Definitive Guide to Retail & Leisure Parks 2018, shows the sector continuing to outperform other forms of retail property with high levels of occupancy, robust rents and sustained occupier demand driven in part by the popularity of click & collect.

During the past year, 'second-hand' supply has, once again, fuelled the growth of a number of expanding retailers. With most new development restricted to extensions to existing 'schemes, a significant amount of vacant space has again been occupied by a number of retailers over the past year.

Since peaking at 10.0% in the middle of 2013, the vacancy rate has continued to reduce despite a number of retailer failures. Since the beginning of 2017, tenants like Jones Bootmaker and Brantano have been put into administration or entered into a CVA while others such as Currys/PC World, Office, Outlet and Carpetright have seen disposals, relocations and downsizing. Between them they potentially increased the amount available by over one million sq ft of floorspace at the end of 2017, similar to the amount that came to the market in 2016.

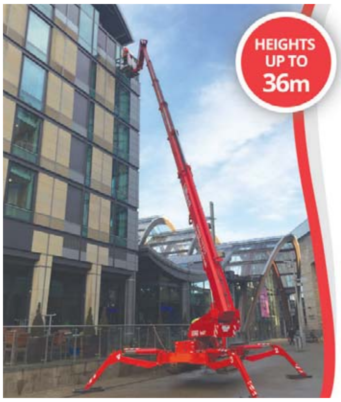
The better news is that, during 2017, over three million sq ft of floorspace was taken by retail park tenants, although this was lower than the amount that opened in 2016.

The ten fastest-growing retail park tenants occupied just over 2.0m sq ft of retail warehousing floorspace during the past 12 months and they have occupied a total of 5.0m sq ft of additional floorspace since 2014. This has helped to drive down vacancy levels and the retail warehousing vacancy rate has fallen to 4.9%, lower than at any time since Trevor Wood's analyses began in 2001. However, vacancy is expected to rise in 2018.

As before, there are significant differences when looking at vacancy by planning consent but the gaps have narrowed this year. Much recent take up has been by comparison goods retailers predominantly interested in good quality Open A1 Non Food units or by variety retailers looking for good value bulky goods units. At the end of 2017 TWA calculated the Open A1 vacancy rate as 4.7% compared to 4.5% in 2016 with Open Non Food units falling to 4.9% from 5.4% and other units falling from 5.4% to 4.6%.

TWA research shows that the total retail warehouse market grew marginally to 190.30m sq ft in 2017 from 187.34m sq ft in 2016. The proportion taken by comparison goods retailers (excluding DIY) once again rose to an all-time high of 57.4% in 2017 compared to 56.9% in 2016. Within the total market TWA found that floorspace on retail parks grew to 120.86m sq ft in 2017 from 118.28m sq ft. Excluding DIY retailers, the share of retail parks' floorspace in 2017 occupied by comparison goods retailers rose to an all-time high of 62.0%, up from 61 .4% in 2016.

ACCESS



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GIVE RETAIL A SPORTING CHANCE

The worlds of sports and retail are colliding, believes **Russell Scott**

Two of the biggest markets we work in are sports stadia and shopping centres. On the face of it, very different markets and customer profile, but both facing similar challenges in creating an experience that encourages their customers to arrive earlier, spend more, stay longer and return more often.

And while our biggest challenge in sport is helping clubs turn their fans into customers; it's becoming increasingly clear that the focus of our work in retail is helping turn their customers into fans.

Sporting organisations, particularly football clubs, have customer loyalty that most consumer brands can only dream of, confirmed by the 'Spurs till I die' tattoo that greeted me in the gym earlier this week. But that loyalty comes at a price, you only have to look at the fallout from a new owner deciding to get 'his' team to play in another colour to realise how carefully loyalty needs to be handled.

Huge improvements in access to content have driven football's boom. TV coverage has improved in both quality and quantity while highlights on social media and countless websites make football a 24/7 experience. This serves to create greater awareness and engagement with the sport but also means clubs are having to work hard to maintain the appeal of the live event, making sure the matchday experience keeps pace with the new ever-present and seductive digital alternatives.

In reaction to this instant coffee has become freshly ground and locked gates have opened early welcoming supporters into fan-zones where our giant screens and production teams deliver a carefully curated mix of content and brand activation, helping to build the excitement all the time accompanied by opportunities to buy merchandising, food and drink.

But the core change is important, the 90-minute match isn't enough to ensure the audience doesn't opt for the cinema, a restaurant or just the sofa as an alternative. Fans' expectations have changed, new younger audiences expect to be entertained and if the experience doesn't evolve they'll spend their time and money on a long and appealing list of alternatives.

Retail is facing a very similar challenge. Competition isn't coming from the centre in the next town, it's coming from the device in customers' pockets. Choice and convenience used to be enough – acres of car parks and a strong anchor tenant was a recipe for success – but no matter how big your car park it's never going to compete with the real convenience of not leaving the sofa and having your purchases brought to you.

So the battleground is shifting, but just as technology is creating the challenge, so it can be harnessed to help address the problem. More and more venues are using big screens to share compelling content experiences allowing audiences to both consume and contribute to the narrative and be used as a platform to create those social moments that help to drive genuine customer advocacy and push them into fan behaviour territory.

But there is a challenge. To date most of the screens we've installed in retail have been for advertising, pure revenue generation, capitalising on high footfall to generate welcome additional income but without contributing to customer experience.

A new approach is needed. One that meets, greets, moves and excites customers and one that recognises that the audience changes, not just by season but also by time of day and day of week. Technology has a big part to play in shaping the audience experience. Physical installations of large format digital canvases create the opportunity to engage people but it's the content that becomes critical, if the focus is purely commercial consumers are sophisticated and quickly tune out.

It's an evolving model but one that has the customer at its heart, designing content plans that adapt to the needs of the business and the desires of the audience enabling a blend of experience, entertainment and brand partnerships to be delivered. The idea that the physical experience could be adapted to suit the audience is hugely compelling. The appeal of a higher yielding commercial model that's accurately targeted to the audience is convincing, even more so if it generates enough income to fund the experience. Who knows, if we make the experience good enough perhaps shopping centres can charge an entry fee, or even start selling season tickets...

Russell Scott is head of commercial at ADI.

Intu takes bugs on tour

Intu has launched Big Bugs On Tour, a national exhibition that brings adults and children face-to-face with 12 giant British bugs at 13 intu shopping centres nationwide.

The initiative is being backed by naturalist Chris Packham and features 12 supersized, indigenous bugs including the honeybee, ladybird, hornet, swallowtail butterfly and the nut weevil. It launched at intu Lakeside and will be on display until the end of July before spending the next year visiting 12 other intu centres around the country including intu Trafford Centre, intu Metrocentre and intu Braehead.

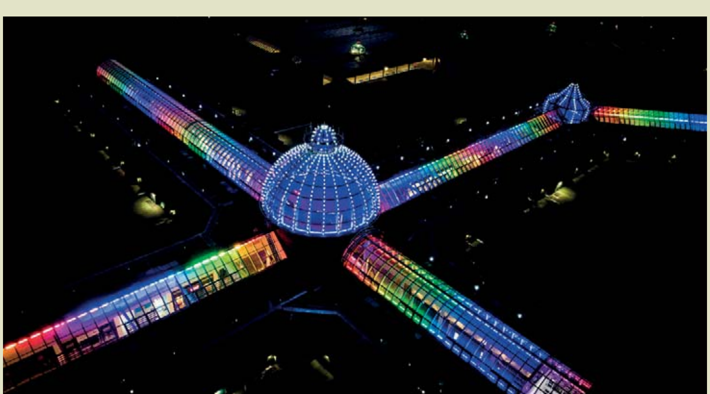
The campaign to reconnect kids and adult to nature comes as reports show children are now better at identifying Pokemon characters than British wildlife, despite a £10m pledge from Government to encourage children to get closer to nature.

Roger Binks, customer experience director for intu, said: "We know that a closer connection to nature makes people happier and Big bugs on tour is an opportunity to help educate adults and children on the importance of the bugs in their gardens and put a smile on their faces."

Meadowhall glows with pride

In a first for Meadowhall, British Land has illuminated the South Yorkshire regional mall to celebrate the tenth anniversary of Pride Sheffield and kickstart its fundraising activities.

Visible from the M1, Meadowhall's glazed roofs were lit with the colours of the iconic Pride flag each evening until Pride Sheffield, which took place in the city on July 28.



This month's moves . . .

CBRE has appointed NEIL CHURCHILL as centre director for Festival Place, Basingstoke. He will join Festival Place from his position as general manager at Southside Wandsworth where he oversaw a £30m extension and reconfiguration.

COLLIERS INTERNATIONAL has strengthened its retail division with the appointment of LIZZIE KNIGHTS as a surveyor in its Central London agency team. She joins Colliers from BNP Paribas, where she worked in the retail agency and investment teams.

SAVILLS has expanded its out of town retail team with the appointment of director ANDY HALL, who is based at the firm's Manchester office. His retail career to date spans 24 years, most recently including a decade as partner in the retail team at Cushman & Wakefield.

GCW has promoted SIMON HORNER to equity partner. He leads the alternative sectors team, covering areas such as hotels, retirement living, gyms, children nurseries, student housing and drive thru restaurants.

MILLIE EVANS has joined niche retail and leisure agency HRH RETAIL as a graduate surveyor to assist with its expanding portfolio of high street and shopping centre instructions. She recently graduated from the University of the West of England with a first-class honours degree in estate management.

GVA has strengthened its restructuring offer with the appointment of ED COOK. He brings more than 15 years of experience and joins GVA from the National Asset Management Agency in Dublin.

INCENTIVE FM has strengthened its senior team by appointing CLAIRE RUMSEY as operations director. She has a background in engineering and manufacturing and has been with Incentive FM for the past four years in regional management roles.

Specialist asset manager REALM has grown its leasing team with three appointments. GARETH HINE has been appointed as a leasing manager and arrives from Lambert Smith Hampton where he was associate director of retail & leisure agency. WILLIAM BLAKE also joins as a leasing manager from a role as asset manager at Capital & Regional. And MAX DELAMAIN joins as leasing surveyor from CHD Property where he was a commercial leasing manager.