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Tipping point for landfill

Technology diverts
food waste from landfill



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to streamline parking

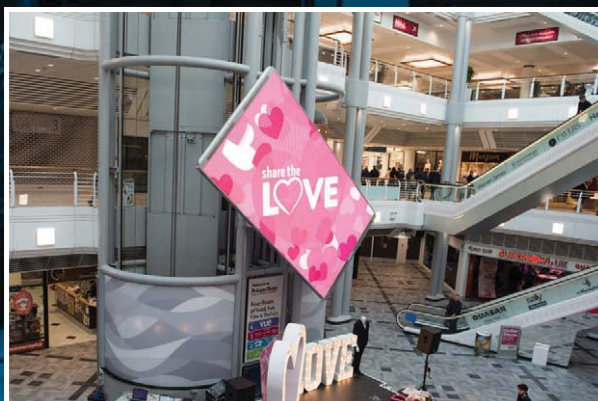


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Editor's letter

Editor

Graham Parker
07956 231 078
graham.parker@jld-media.co.uk

Editorial Assistant

Iain Hoey
07757 946 414
iainhoey94@hotmail.co.uk

Sales Manager

Trudy Whiston
01293 416 090
trudy.whiston@jld-media.co.uk

Database Manager

Dywayne Ramsundar
01737 852 342
dywayne.ramsundar@jld-media.co.uk

Design & Production

Stuart West
01737 852 343
stuart.west@jld-media.co.uk

Publishing Director

Helen Richmond
01737 852 344
helen.richmond@jld-media.co.uk

Editorial Board

Carl Foreman, Moorgarth; Byron Lewis, Mall Solutions Europe; John Prestwich, Montagu Evans; James Taylor, Workman; Michelle Burton, Toolbox; Jordan Jeffery, JLL; Sean Kelly, PR4Property

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Dowlais
Merthyr Tydfil
CF48 3TD

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At last there are signs that landlords are pushing back against the CVA process. Mothercare has become the latest to use the CVA route to walk away from 50 leases and demand rent cuts on another 20 stores. House of

Fraser is widely forecast to be next, with as many as 30 stores earmarked for closure.

However the CVA is a form of insolvency and the question has to be asked whether these businesses are in fact insolvent. In the end that's a decision for lawyers and accountants and not magazine editors, but the suspicion is that companies now see the CVA as a convenient loophole to drive corporate restructurings that would otherwise take several years.

And it's not just landlords that are objecting. Next CEO Lord

Wolfson has complained that a two-tier market is emerging with retailers paying widely different rents for adjacent stores depending on whether or not they have been through a CVA. He's now inserting CVA clauses into leases allowing Next to claim a rent cut if a neighbouring brand wins one through a CVA. If others follow it will truly open a can of worms.

Graham Parker
Editor
Shopping Centre

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Burlington Arcade sold for £300m

Thor Equities and Meyer Bergman have sold London's Burlington Arcade, Mayfair to a private investor for £300m reflecting a net initial yield of 3.25 per cent.

The arcade, which opened in 1819, has approximately 37,000 sq ft of retail space and a combined frontage of over 1,100 ft, attracting over four million visitors a year. It is the longest covered shopping street in the UK, linking Piccadilly and Burlington Gardens. Tenants include Chanel, swim and lingerie label Erees, watchmaker Bell & Ross, milliner Maison Michael, Ladurée, Vilebrequin, Lulu Guinness, Church's and La Perla.

Thor Equities and Meyer Bergman acquired the grade two listed, luxury retail arcade in 2010 for £104m and have since undertaken several upgrades, including a redesign by UK architect Jamie Fobert.

Joseph Sitt, CEO of Thor Equities, said: "After repositioning and restoring the Burlington Arcade to its former glory, we felt the time was right to sell this historic landmark. With its magnificent redesign and new luxury tenants, the property will remain a treasured London destination for generations to come."

Savills and Michael Elliot advised the vendor.



Boardman rides into the Valley

The Valley, Eagle One's leisure and retail destination set on the banks of the River Avon in Evesham, is preparing for increased footfall following the recent launch of the 18,000-sq ft Boardman Performance Centre, a partnership with Olympic gold-medallist Chris Boardman MBE.

The brainchild of Boardman himself, the centre – the first of its kind in the UK – is aimed at everyone from would-be Olympians to weekend hobbyists aiming to better understand how to improve their rides. In addition to its centrepiece wind tunnel, it will offer a range of services delivered by industry specialists in

areas such as physiological fitness, function and health, bike-fitting, positional biomechanics and aerodynamics.

Robin Langford, asset manager at The Valley, Evesham, said: "As an out-of-town retail destination, we understand the need to not just offer a shopping fix, but a range of other experiences to our customers. As such, we are anticipating a significant increase in footfall as a result of the centre launch, and have just added an additional 15,000 sq ft of new retail units within the centre. We also have consent for a further 40,000 sq ft to be developed in response to anticipated occupier demand."



TJ Hughes takes Wellgate BHS

The Liverpool-based discount department store which has been in existence since 1925 has agreed to a new 15-year lease on a 53,888 sq ft retail unit, located at the main entrance to the centre. The flagship letting comes quickly on the back of agreeing a new lease with the discount gym operator, Xercise4Less, which has taken 31,000 sq ft on the second floor on a 12 year lease. It is anticipated Xercise4Less will be open for trade by the end of July 2018 and TJ Hughes by October.

Other retailers at Wellgate

include B&M, Holland & Barrett, Home Bargains, New Look, The Entertainer and Subway.

Stuart Moncur, head of national retail at letting agent Savills, said: "Our strategy has been to secure new anchor occupiers, and with the arrival of both Xercise4Less and TJ Hughes, we certainly believe the Wellgate is on the up. We are excited about the prospects for Wellgate going forward and expect to have further new lettings to announce later in the year".

TJ Hughes was advised by Tienda Property while CBRE advised Xercise4Less.



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Canada Water in for planning

British Land has entered into a master development agreement with Southwark Council and submitted an outline planning application for the Canada Water masterplan, one of London's most significant development projects which will create a new urban centre for London on the site of the existing Canada Water shopping centre.

The masterplan is expected to deliver up to 3,000 new homes, two million sq ft of workspace and one million sq ft of retail, leisure, entertainment and community space including proposed health and social

infrastructure, and educational uses for all ages.

Alongside the overall Masterplan the planning submission also includes a detailed planning application for the project's first three buildings, which include workspace, homes and a new leisure centre. Subject to planning approvals, construction of the first buildings will begin in spring 2019.

Roger Madelin, Head of Canada Water Development, British Land, said: "Submission of our planning application for the Canada Water Masterplan marks an important milestone in the delivery of this project.



"Drawing on our experience of creating vibrant, mixed-use places across the capital, this major urban centre at Canada Water will provide an exciting

place to live, work and visit, delivering high quality design, active spaces and significant economic and social benefits for the local community."

Savills acquires Broadgate Estates portfolio

British Land has agreed to sell the third-party portfolio within its property management business, Broadgate Estates, to Savills. The deal will add landmark assets like Liverpool One to Savills' property management operation, which already covers 360 million sq ft in the UK, and enable British Land to dedicate Broadgate Estates to maintaining a premium experience for visitors to its own portfolio, in line with its strategy of creating Places People Prefer.

Broadgate Estates was established in 1986 and has since grown into a team of 500 people managing 83 assets across the UK, approximately half of which are owned by British Land. The third-party portfolio comprises contracts to manage 28 locations in London and Liverpool for 14 clients. Approximately 160 employees are expected to transfer to Savills under the terms of the deal.

Mark Ridley, deputy global CEO of Savills, said: "Property management is key to our business and this unique opportunity will undoubtedly strengthen Savills' global property management business providing great opportunities for all transferring staff."



50,000 sq ft let at Fort Kinnaird

The Gibraltar Limited Partnership, where British Land is property advisor, has signed over 50,000 sq ft of store openings and lettings at Fort Kinnaird. Fort Kinnaird has over 560,000 sq ft of retail and leisure space including a 39,000-sq ft Primark, a seven-screen Odeon cinema and a range of restaurants.

The new lettings include Wagamama, which will open a new 4,000-sq ft restaurant in 2019; Swarovski in 1,460 sq ft; Skechers in 6,500 sq ft; Barrhead Travel in 2,000 sq ft and Elegance in 400 sq ft.

Recent openings include: a 23,500-sq ft Currys PC World store and Schuh/Schuh Kids in 5,000 sq ft while JD Sports doubled its store to 10,000 sq ft.

British Land asset manager Grace Hodnett said: "Understanding our customers at Fort Kinnaird has provided valuable insight into which brands will thrive at our centre. We've therefore been able to grow footfall and consumer spend for our occupiers and attract further new brands to the scheme. Our focus continues to be on creating the right environment for retailers and consumers."

The Gibraltar Limited Partnership was advised by Eric Young & Co and Paradigm Property Consultants.

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THE SCEPTRE AWARDS 2018 SHORTLIST

Marketing Manager of the Year

- Francesca Oldham, Grand Arcade
- Samantha Czwordon, The Bridges Shopping Centre
- Lucy Burnett, Touchwood Solihull
- Dan Wharton, Trinity Leeds
- Lauren Campbell, Victoria Square
- Nikki Appleton, White Rose Shopping Centre

Commercialisation Innovation of the Year

- The Beach Bar, The Oracle
- Defy Complacency, Touchwood
- intu Three Mobile Student Nights
- Les Artisans Chocolatiers, Brent Cross
- Paco Rabanne ceiling vinyl, Bullring
- VIP Electronic Cigarettes

Retail Liaison Award

- Broadway Shopping Centre
- intu Metrocentre
- Mill Gate Shopping Centre
- The Bridges, Sunderland
- Victoria Square
- Westfield Stratford

Operations Manager of the Year

- Steve Salisbury, Crystal Peaks Shopping Mall and Retail Park
- Steven Lynskey, Golden Square Shopping Centre, Warrington
- Nick Coppock, intu Milton Keynes
- Morag Dennis, Overgate, Dundee
- Phil Brown, Strand Shopping Centre
- Tiernan Barrett, Trinity Walk Shopping Centre
- Peter Moonan, Willow Brook Shopping Centre

Young Achiever of the Year

- Neil Eley, Cwmbran Centre
- Lisa Jackson, intu
- Metta Ramsey, Overgate, Dundee
- Jade Wilkie, The Forge Shopping Centre
- Georgia Hillyard, The Glades Bromley
- Rebecca Woodhead, Trinity Leeds

Short Term Retailer of the Year

- Jagerhaus Bar, Angel Central
- Chapel Down, Bluewater
- Shepherd Neame, Bluewater
- CBD, Castlecourt
- Footbalance, Grand Central, Birmingham
- Amorino Gelato, Victoria Leeds

Energy Management Award

- Cwmbran Centre
- St Marks Shopping, Lincoln
- The Bentall Centre, Kingston
- The Pavillions Shopping Centre
- White Lion Walk
- White Rose Shopping Centre

Waste Management Award

- Cabot Circus
- Friars Square Shopping Centre
- Gunwharf Quays
- Ropewalk Shopping Centre
- The Brunel, Swindon
- White Lion Walk

Security Team of the Year

- Bluewater
- Crystal Peaks Shopping Mall & Retail Park
- Friars Square Shopping Centre
- intu Metrocentre
- Pavillions Shopping Centre
- Quadrant Shopping Centre, Swansea

Customer Service Team of the Year

- Bluewater
- Crystal Peaks Shopping Mall & Retail Park
- Gunwharf Quays
- Manchester Arndale
- The Glades, Bromley
- Whiteley Shopping Centre

Mall Technology Innovation of the Year

- Hammerson Engage
- intu – Shopper Screens
- RetailReport
- OnBrand Offers
- Orchard Shopping Centre Taunton
- The Pod, Trinity Leeds

All Ireland Manager of the Year

- Ian Hunter, Pavillions Shopping Centre
- Michelle Greeves, Victoria Square
- Peter Dolan, Scotch Hall Shopping Centre

Manager of the Year (Small Centre)

- Charles Bevan-Baratt, Capitol, Cardiff
- Charlotte Jarrett, Clifton Down Shopping Centre, Bristol
- Steve Andrews, The Hildreds
- Claire Kirkham, Merlins Walk Shopping Centre
- Dean Cross, Waterside Lincoln
- Cyrus Annan, West One Shopping Centre

Manager of the Year (Medium Centre)

- Gary Little, Elmsleigh Shopping Centre
- Derek Askew, Manchester Fort Shopping Park
- Lynette Howgate, Middleton Shopping Centre
- Rowland Parry, Strand Shopping Centre
- John O'Shea, The Grafton, Cambridge
- Lee Appleton, The Ridings

Manager of the Year (Large Centre)

- Mark Haynes, County Mall Shopping Centre, Crawley
- Liam Smith, Fort Kinnaird
- Marie Gribben, Mill Gate Shopping Centre
- Guy Henderson, Southgate Bath
- Kate Miller, The Glades Bromley
- Deborah Jones, The Mall at Cribbs Causeway

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M&S speeds up store closures

A further 14 M&S stores have been added to the closure list at the ailing high street giant, meaning over 100 M&S stores will close by 2022 as the company's radical transformation plan continues at pace. At the same time store openings are being cut back with 15 fewer owned Simply Food stores due to open this year

The next 14 Clothing & Home stores that are proposed for closure in 2018/19 as part of the transformative programme are: Bayswater, Fleetwood Outlet and Newton Abbot Outlet to shut by the end of July 2018; Clacton and Holloway Road to close by early 2019

Darlington, East Kilbride, Falkirk, Kettering, Newmarket, New Mersey

Speke, Northampton, Stockton and Walsall which will now enter a period of consultation.

Sacha Berendji, retail, operations and property director at Marks & Spencer, said: "We are making good progress with our plans to reshape our store estate to be more relevant to our customers and support our online growth plans. Closing stores isn't easy but it is vital for the future of M&S. Where we have closed stores, we are seeing an encouraging number of customers moving to nearby stores and enjoying shopping with us in a better environment, which is why we're continuing to transform our estate with pace."



New ID for three UK outlets

Outlet investor Global Mutual is set to introduce new branding for the three outlet schemes it acquired in 2017 situated in Stoke-on-Trent, Fleetwood and Bideford. All three will operate as Affinity Outlets, becoming Affinity Staffordshire, Affinity Lancashire and Affinity Devon.

The company says the Affinity brand will place emphasis on es-

sential elements to achieve excellence in outlet retail: a strong line up of brands, extraordinary savings, welcoming environments and high standards of service. Global Mutual's main intention for launching the Affinity brand is to enhance the customer experience, broaden the outlets' appeal and drive growth.

Nicky Lovell at Global Mutual said

"Ours is a simple philosophy – by creating spaces that make our retailers and customers happy, we also create commercially vibrant environments – where people want to spend both money and time. As the 'Affinity' name suggests, the essence of our new brand is 'connection and closeness'. We build loyalty and create affinity."

House opens first UK stores

Homewares and kitchen retailer House has opened its first two stores in the UK, with four more locations to open before the end of June.

The first store opened at Westgate Oxford, offering more than 2,000 products including cookware, bakeware, glassware, kitchen gadgets, small electrical appliances, knives, table linens and accessories. Two more stores, at The Lexicon in Bracknell and at Meadowhall in Sheffield, will open in the next two weeks while stores at Norwich and Cribbs Causeway will follow shortly after.

Developed with assistance from property consultant MMX Retail, House's plan is to open 75 UK stores within three years.

Established in Australia in 1978, House is a member of the Global Retail Brands group which also includes the Robins Kitchen chain of stores. Together, they have more than 170 stores across Australia.





WHAT'S UP IN WATFORD?

The 400,000-sq ft extension at intu Watford is now taking shape, and six months from opening 75 per cent of the space is pre-let.

On completion this autumn the extension will turn intu Watford into a 1.4 million sq ft retail and leisure destination that will push the town into CACI's top 20 national retail destinations on a par with Edinburgh or Bristol. Rebecca Ryman, intu's regional managing director, explains: "The ethos of the scheme is to create a regional mall, but in a town centre setting."

The new space is split roughly three ways, with a third leisure, a third F&B and a third retail. Retailers already signed include Debenhams, Superdry, H&M and Jack Wills. New Look, which was decanted from the old scheme, will be moving back in and several more high-profile fashion names are due to be confirmed shortly. Ryman says the focus has been on creating large linear boxes with double-height shopfronts that will allow brands to showcase their full range, but this means that the scheme will actually only provide 14 new stores.



"We've got some tricky decisions to make," muses Ryman, explaining that the leasing strategy has been to bring together the best brands to provide more choice and appeal for the centre's highly affluent customer base.

The leisure anchor will be a 40,000-sq ft Cineworld multiplex with nine screens, one of which will be an IMAX. Remarkably for a town of its size, Watford town centre doesn't currently have a cinema. This is even more surprising given that the town is home to the Warner Bros Studio, which is one of the most visited UK tourist attractions. And Hollywood Bowl has signed for a 23,626-sq ft tenpin bowling centre.

The extension will also house 11 restaurants, with catering brands ThaiKun, TGI Friday and Yo! Sushi among names already confirmed. Latest to sign is the New World Trading Company which will trade from 9,300 sq ft as The Florist.

The extension is being built on the site of the former Charter Place shopping centre, an open-air precinct which intu bought from Watford Council in 2013. Parts of the old structure have been retained, most notably the Charter Place multi-storey car park which is being refurbished internally by USL and reclad so that its look and feel is consistent with the new scheme. Equally, Watford's YMCA hostel sits above Charter Place, and has stayed open throughout the redevelopment.

The new scheme has a large central square, underneath



a high-level glazed roof to give shelter from the elements. For the first time intu Watford will have a dedicated events space and according to Ryman planning is already under way for the launch events and the Christmas programme. "The square will allow us to create a sense of place and destination," she says.

In parallel with the construction of the extension, intu has invested £20m in a refurbishment of the existing centre, where the existing anchors are John Lewis, Primark, Apple, Next and M&S. The old ornate flooring has been replaced with a contemporary neutral colour scheme, and high-level illuminated panels will provide a striking feature on the upper mall. New mall seating is also being installed.

A major focus of the refurbishment has been the existing centre's three car parks, which have all been upgraded in a two-year rolling programme. Because the car parks are so busy, works have been carried out on a floor-by-floor basis during quieter periods of the year, but now they are nearing completion.

Bays have been widened to accommodate modern vehicles, and more EV points have been installed. "They're light, bright, and it's made a massive difference," says Ryman.

Although the new extension will major on leisure and F&B, Ryman says intu's strategy has been to distribute these uses across the whole scheme rather than having a themed leisure zone. Climbing wall operator Rock Up has taken a triple-height 8,460-sq ft unit at the centre's High Street entrance, where Clas Ohlson formerly traded. "Rock Up's absolutely bang-on for our catchment," Ryman says.

The unit will sit alongside a new cluster of catering units where GBK and Tortilla are already trading. Ryman says the aim is to add more 'grab & co' catering in this zone to cater for the town's office workers. There is also potential to add a gym operator to the mix.

At a time when retailers and their landlords are under pressure, new shopping centre developments are thin on the ground. But intu has committed £180m to Watford. For Ryman the numbers are compelling: she points out that Watford welcomes 38 million visitors to the high street every year and is also home to some of the UK's largest head offices with companies including ASOS and TK Maxx. The town centre is also seeing a surge in residential development.

"It's the most affluent catchment in our portfolio," Ryman concludes.



Food waste is a problem that needs to be addressed

When food waste ends up in landfill, it produces a large amount of methane gas which is more damaging to the environment than carbon dioxide. The greenhouse gases absorb infrared radiation and heat up the earth's atmosphere, contributing to global warming and climate change. Food waste is a growing issue for the shopping centre industry as the rise of F&B has naturally spiked an increase in food consumption and, as a consequence, food waste.

It is up to centres to do their part in making sure that as much of their food waste is collected and treated as possible and bringing down the percentage that ends up in landfill. There are a number of products and solutions available, and one which has been adopted by Hammerson at Westquay Southampton and Cabot Circus in Bristol, is the Organic Waste Logistics system, or OWL.

In 2017, Hammerson launched a net positive strategy, and in line with this mission to create retail destinations that deliver value, creating sustainable impacts for future generations was a key consideration. The OWL system was first trialled by the landlord at Cabot Circus in 2017 and featured bespoke adaptations to suit its specific requirements.

The new system was important as every month 35 tonnes of food waste was generated at the centre. Thanks to OWL, 100 per cent of this waste was recycled, which

came with a number of benefits, including food waste collections reducing from three times per week to three times per month, plus all waste oil is now processed via the OWL, eliminating the need for any collections.

As a result of the successful trial, Cabot Circus has become a flagship Hammerson training location for other centres which are to introduce in the OWL system in the future. Westquay Southampton, which saw the opening of its massive new dining quarter in late 2016, discovered how much of an issue food waste could be. The extension, which houses 25 restaurants, generated approximately 100 240-litre bins of unavoidable food waste per week for recycling.

A number of logistical issues presented the centre with the need for a compact solution to its food waste problem. The limited yard space meant that even with daily pickups the necessary bins would still occupy too much space, the necessary frequency for pickups could interfere with truck deliveries, and the raised carbon emissions from so many pickups would increase the centre's footprint.

Hammerson worked with OWL to install a standard BioWhale solution which can store the equivalent of 12 tonnes of foodwaste (around 150 240-litre bins) while only occupying the footprint of 10 wheeled bins. The unit was designed specifically to meet the centre's needs, with a raised loading dock in place of the BioWhale's traditional

steel hopper on the side for loading food waste. The system only needs to be emptied every 10-14 days.

Louise Ellison, group head of sustainability at Hammerston, says in the property company's 2017 sustainability report: "The introduction of the BioWhale at Westquay, Southampton in 2016 to support the management of organic waste has worked well. The system generated additional benefits of improving waste separation by the restaurants which continues to support recycling rates at the site. A second BioWhale has been installed at Cabot Circus in 2017 and is, again, supporting better waste separation and recycling.

"10 per cent more gas was generated through the anaerobic digestion of food waste at Cabot Circus in 2018 than is used on site. This is an early demonstration of the possibilities for Net Positive across the assets."

Onsite food waste treatment has a long list of benefits, not least reducing a centre's environmental footprint. Installing a system can save space, reduce pickups, and go a long way to tackling the growing problem that has arrived from the rise of F&B.

So how does OWL work? OWL's BioWhale system, which was specifically design for OWL by waste tanker manufacturer Whale Tankers, is a vacuum storage unit. When food waste is tipped into the machine's stainless steel hopper, a button is pressed which activates a vacuum to suck the food waste into the unit. This vacuum action shreds the waste into small pieces and delivers it to another shredder that grinds it even smaller. The ground waste is then held under an air vacuum to ensure there is no odour released and the food waste does not lose any of its energy value.

The BioWhale tank is gradually mixed to break down the food waste into simple sugars, fatty acids and amino acids. The level of the storage tank is monitored online and when it approaches capacity, an OWL vacuum tanker truck is automatically dispatched to empty the tank. All food waste is recycled into green energy (electricity or gas) and organic fertiliser at one of the UK's 150 food waste AD plants.

The BioWhale unit comes installed in a steel container; and locked steel panel doors protect the hopper and

CONVERTING ORGANIC WASTE INTO GAS, ELECTRICITY AND FERTILISER

1. Food waste delivery is blended with all the other organic wastes into feedstock.
2. The feedstock is fed to micro-organisms (in the absence of oxygen) which breakdown organic material into biogas. The process takes from 3-4 weeks.
3. The biogas is processed into a natural-gas equivalent fuel, bio methane.
4. The bio methane is fed to a conventional engine and converted into electricity.
5. The spent feedstock, digestate, is pasteurised to eliminate any pathogens.
6. The pasteurised materials become a nutrient-rich, organic fertiliser, valuable in agriculture and soil conditioning.
7. The waste heat from the engine is recycled to supply the heat for pasteurisation and to warm the feedstock, increasing the effectiveness of the anaerobic digestion process.

controls. The unit plugs into a standard 440 volt/32 amp electrical service and requires little electricity. The machine uses no water and so does not need a connection to clean water or wastewater services.

In the rare case that the machine might accidentally be fed non-organic material, it has a mechanism in place which extracts non-food waste to a sump where cutlery and the like can be removed during routine service calls.

The BioWhale is monitored online via an intelligent diagnostic system, which monitors multiple performance points. If there are any deviations from standards, these are automatically alerted to OWL control centre that can dispatch a fully equipped service vehicle from one of its national service centres.

If the unit breaks, the system is vacuum sealed, meaning that even with breakdown or general power failure, the vacuum will be maintained for two to three days, preventing any odour or materials from leaking into the environment. Once power is restored to the system it will automatically restart itself.

The final thing to note is that the OWL system will provide users with a monthly management report that will show the amount of food waste collected, energy produced, carbon dioxide savings and organic fertiliser produced.





AVOIDING OVERCHARGING

Voltage optimisation and LED switchover reduces unnecessary energy usage.

Throughout 2017 it became more and more difficult to ignore the rising energy costs across the UK, especially due to the ever-increasing pressure on transitioning to a sustainable, green future. Stuart Clegg, CCO for energy storage and voltage optimisation brand, Powerstar, says that the opportunities for businesses in the retail industry, particularly large shopping centres, to lower energy consumption, and reduce CO₂ emissions and generate energy cost savings, allowing for further investment into core activities and customer satisfaction, are numerous.

"The effects of [rising energy costs] are quickly felt by high-energy users, such as those within the retail sector, particularly shopping centres, which are subject to long operating hours, heavy footfall and temperature-controlled goods, in addition to being responsible for a plethora of employee and customer satisfaction measures such as providing a comfortable climate, eating facilities, and extensive lighting," says Clegg. "This requires a large range of electrical equipment, which can result in significant energy consumption and costs."

He says that this, combined with pressure to deliver low-carbon energy strategies, can be a big headache for facilities managers. Despite this, however, he believes it also brings the opportunity to benefit from energy management technologies that deliver tangible reductions to energy consumption, carbon footprint, and energy costs.

"Across the UK, voltage is often supplied at a higher voltage than is required by commercial properties," Clegg explains. "Energy management solutions, such as voltage optimisation technology, can lower the incoming supply to an optimal level to meet the requirements of the site's equipment and deliver the aforementioned benefits."

"Voltage optimisation is a globally recognised and

proven technology, especially when commissioned as a tailored solution based on data as opposed to the off-the-shelf products which are not equipped to deal with unique site requirements."

Powerstar has worked with many shopping centres around the country to provide energy saving solutions, including the Four Seasons shopping centre in Mansfield. Powerstar undertook a full analysis of the requirements, voltage profile and survey of the centre to recommend a solution.

The Four Seasons was actively looking for ways to reduce its energy consumption and carbon footprint while saving on electricity bills to reinvest into enhancing the consumer experience. As the centre is open seven days a week, it was necessary that the installation of the technology didn't affect the day-to-day operations of the facility.

Clegg says that the incoming voltage at the centre was stable but higher than required, recorded at an average of 240.9V. As most UK electrical equipment is designed to operate optimally at around 220V, the excess supply of voltage was causing needless wear and tear on the equipment and resulting in inflated electricity consumption, producing unnecessarily high energy bills and CO₂ emissions.

The solution from Powerstar was a fixed voltage optimisation 179kVA Powerstar LITE. "We implemented the concept-to-completion service with minimal disruption to the centre's operations setting out an engineering-led, bespoke solution for the Four Seasons to provide significant reductions in electricity costs, CO₂ reductions, and guaranteed energy savings," Clegg explains.

"Following the installation, the voltage optimisation solution is delivering a fixed reduction of 17.5V, lowering the centre's incoming supply to an optimised average of 223V, reducing its annual electricity consumption by 24,289kWh, equating to guaranteed annual savings of 7.5 per cent."

Martin Moran, operations manager at the Four Seasons shopping centre, says that to date, the technology has had a significant effect in reducing the centre's electrical consumption, "Powerstar successfully managed the installation of the voltage optimisation and power factor correction systems at the Four Seasons shopping centre through a tailored solution that met our requirements, while not disturbing the service provision to our customers."

Voltage optimisation is just one way to reduce electricity consumption. Another means to reduce energy charges which has long shown guaranteed results is the replacement of old lamp technologies with LED lights. Vicky Cotton, environmental and sustainability director at Workman, has been liaising with Hammerson to fit LED lights across the property company's entire retail park portfolio with great results.

"With the bar for environmental standards constantly being raised, Workman has found a growing demand for modern LED technology, which not only conserves more energy to create the same amount of light, but can also include motion and daylight sensors to ensure that lighting is only turned on when necessary," Cotton says.

"Workman was asked by Hammerson to complete a full tender for the lighting refit of 10 retail parks with a view to phasing out obsolete lighting systems in favour of modern LED technology. We have completed two retail parks already, and while these were only completed in October and December respectively, the preliminary data shows that we've reduced energy consumption by around 60 per cent on both sites. We are now looking to roll this set up across the other eight retail parks."

Cotton notes that the impact of more sustainable lighting has come with the secondary benefit of improving public perception. Through the UKGBC Health and Wellbeing project, Workman found that guests to centres which has fitted LED lighting reported feeling safer and are leaving more positive reviews about parking areas. She calls the projects a "win-win" situation of a reduced energy bill and an improved customer experience generally.

Looking beyond LED, Cotton tells that there is potential in other areas to improve the energy saving prospects of Hammerson's sites. She says: "Workman has also been looking at the electric vehicle market and at the potential to upgrade current support infrastructure in order to install charge points in line with the client's strategy."

"With technology in this area developing so quickly and ownership/lease models varying considerably, we are working with specialist consultants to ensure flexibility is built into these installations, especially as battery technology improves so rapidly. Driverless technology also opens up a number of possibilities, so certainly in the longer term electric vehicles have tremendous potential from an energy saving perspective."

Louise Ellison, head of sustainability at Hammerson, adds the property company's support to the plan, saying: "Last year we launched an ambitious plan to become Net Positive across our portfolio by 2030, setting stretching



targets across our four key pillars, Carbon, Resource Use, Water-use and Socio-economic. Our recent projects with Workman form an important part of our on-going strategy to create retail and leisure destinations that drive the best sustainability practices and positive long-term impacts for future generations."

The opportunities for businesses in the retail industry to lower energy consumption, and reduce CO₂ emissions and generate energy cost savings, allowing for further investment into core activities and customer satisfaction, are many, and so managers should continue to reassess their current energy saving strategy to see if they can be further optimised.

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PARKING GOES GREEN



Sustainability should be as much of a concern for the car parks as it is for the mall spaces

The slow but steady rise of electric vehicles is a marker of the increasing importance of sustainable solutions for environmentally conscious drivers. People are looking to reduce their footprint however they can, and parking operators should mirror this step that consumers are making by creating a sustainably conscious environment for shoppers to park their cars. But as with any progressive step, there are new technologies and the underlying costs to install this necessary technology that can quickly put the brakes on the process. The question car parks need to address is how long they can afford put off these inevitable changes.

It is no secret that Sweden is one of the most sustainable countries in the world, and so it is only logical to look to the Swedes as the forerunners of best practice in all things sustainability. This year, two of the world's leading parking and ticketing service providers, Parkeon and the Sweden-based Cale, joined forces to create a global entity under the new brand: Flowbird. The name Flowbird symbolises the partnership's ambition to make individual journeys simpler, safer, faster, while collectively maximising efficiency and harmonising flows. And one of ways to harmonise flow and maximise efficiency is to make sure that the car park is a sustainable structure.

There are a lot of things that can come into choosing a parking product, including: price, durability, and customer service, but one thing that Andreas Jansson, managing

director of Cale America, says should be considered is the recyclability of the product.

"This isn't always something that managers think about when choosing a parking terminal, but in recent years, the value of recyclability has received more attention," Jansson says. According to Cale's hardware management in Sweden, the type of machine that the country uses are designed to be recycled, with most of a terminal's material able to be recycled without significant processing. Whilst the small remainder requires some processing, the bottom line is that nothing goes to landfill.

Mobile payment apps have several benefits, from making it easy to extend a shopper's stay remotely to negating the frustrating need for loose change, and it also has a sustainability benefit in that it removes the need for paper tickets and receipts. While it might not seem like a lot, the amount of paper required can build up quickly and so providing ticketless, digital solutions is the way to reduce the paper footprint as well as avoiding paper jams.

Much new technology comes with an increased connectivity, meaning that many issues can be solved remotely, cutting wait times for frustrated drivers trying to leave or pay and being held up by faulty machinery. Many terminals are becoming remotely controlled, meaning offsite operators will be notified of any faults to the system and can then send push commands to fix the fault as quickly as possible.

Mats Lindberg, account manager for Cale Sweden, says

that nine times out of 10 a reboot is all a machine needs to get back up and running. "Energy savings for the Push Command feature are huge," Lindberg tells. "Think about it. All that time stuck in traffic to even get to a terminal costs time for our techs, adding even more to traffic congestion and contributing to unnecessary CO₂ emissions. These kind of service calls used to consume over 7 million tickets per year and now it's zero."

Innovations in smart parking systems are moving to make it easier to monitor car parks and give an up to date count and location of parking spaces. Putting this information in the hands of drivers and having the ability to be controlled remotely can go a long way to reducing unnecessary emissions for drivers endlessly circling car parks to find empty spaces.

An initiative in San Francisco by SPFPark trialed smart parking solutions which found that with these solutions in place, time taken to find a space reduced by 43 per cent as a result of less circling time, with a consequential drop of 30 per cent in greenhouse gas emissions. The trial also found that parking availability improved 22 per cent during peak periods, the commercial benefits of which speak for themselves.

To top it off, these smart systems are constantly recording data and becoming more intelligent at understanding driver habits, meaning better abilities for parking operators to track individual drivers and manage traffic flow.

A not so recent development to increase sustainability are solar-charged terminals. It might not seem like the most obvious selling point for the perennially-gloomy UK, but a lack of blue skies does not prevent them from generating energy, and their prevalence in Sweden has proved them a success.

Cale's Lindberg says: "The main thing here is the lower cost and savings on installation. Before solar meters, you would have to make it a big project; getting a crew, mapping out the construction, digging to get the power line to the meter and more. Now it's a much simpler process. Just use the sun."

And finally are air quality sensors. Andreas Jansson says that they are just another string to their partnerships sustainable bow: "You can see the efforts all over the industry. Parkeon has partnered with BreezoMeter, an analytics company that will incorporate air quality sensors to Parkeon's smart meters."

These meters, which are otherwise known as, "Park & Breathe" smart meters, use sensors to give an accurate analysis of the air quality data in an area. The important aspect of the advancement is that it can provide car parks with the actionable information needed to make informed decisions for mitigating air pollution and increasing the level of wellbeing for their shoppers.

"Sustainability is one of the many reasons that Cale is joining with Parkeon," says Jansson, "You look at what you can do better within your industry and the answer is simple, come together to create solutions for smart cities to stay ahead."

When it comes to sustainable practice, the parking



industry is moving forward and creating the technology that can help the car park industry become a more eco-conscious space. The question is less of a should we or shouldn't we, because the answer is definitively that we should all be doing our part in creating a more sustainable world. The question instead, for many, is more likely to be one of cost, as when it comes to implementing these technological advancements as soon as they're readily available it may not come cheap. What is clear is that sustainability will be at the heart of many future parking developments and every car park will inevitably become more sustainable.

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ALLIANCE FOR PARKING DATA STANDARDS

*The BPA, EPA, and
International Parking
Institute have launched a
global data sharing platform*

The world is getting smaller and becoming more and more connected, and the UK parking industry is one that can serve to learn from its overseas counterparts. It has been said that data is the new oil, even amid the GDPR regulations, and collating as much data as possible on any subject will provide the more accurate insights. Industries who do not share data may increase competition in their field, but the downside is that it will slow down progress.

In the UK, the country's parking is governed by a multitude of bodies with countless different companies and councils managing different cogs of what is fundamentally



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the same machine. This is a structural issue that needs to be addressed in some way to pave the way for progress in the parking industry.

Achieving a genuinely connected transport system will require capital investment and a singular vision that no one body will be able to bring to life on its own. The current state of disconnect has cluttered the landscape with consumers finding themselves navigating an increasing number of apps and payment mechanisms as they move from one location to the next, which is far from ideal. But it is likely to remain this way if the nation's towns and cities are unable to access each other's data and reshape the way that parking works.

In response to the industry and societal needs for improved access and consistency of parking-related data, an international alliance of parking trade bodies has been formed.

The British Parking Association, the International Parking Institute and the European Parking Association have launched the Alliance for Parking Data Standards to develop, promote, manage and maintain a uniform global standard to allow organisations to share parking data across platforms worldwide. The emerging standard will cover the full range of parking data elements, including parking location information and transactions, pricing, and occupancy/utilisation.

Through the alliance, the three entities have initiated the development of standards for sharing parking-related data to address the significant challenges and effort currently required to integrate new systems, services and apps due to the lack of appropriate standards. The members believe this a step forward in working together with other major stakeholders and organisations to make it better for the parking sector, the consumer and help provide a standard for the future.

The alliance will create a consensus-built international standard to establish a common language for data elements and definitions in the parking, transportation, and mobility sector that will facilitate seamless integration, compatibility, and communication between parking entities, the automotive industry, IT developers, map and app providers, as well as other stakeholders.

The International Parking Industry Payment Standards (IPIPS) developed by the EPA and already available, and the Data Exchange Standards (IPI-DataEx) being developed by IPI will also be integrated by the new alliance. The IPIPS protocols ensure interoperability and help simplify the complex world of e-payments in parking.

One of the key tasks of the alliance will be to ensure that

THE ALLIANCE BOARD OF DIRECTORS:

- CEO: Shawn Conrad, CAE, CEO, International Parking Institute
- COO: Andrew Pester, CEO, British Parking Association
- Chair: Nigel Williams, Board Member, European Parking Association

BOARD MEMBERS:

- Laurens Eckelboom, vice president, business development, connected vehicles, SAP
- Mike Drow, senior vice president, corporate development, T2 Systems
- Keith Williams, technical director, Parking Matters (UK),
- Nick Lester-Davis, consultant, past president EPA, vice president Ertrac
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- Joao Caetano Dias, EPA policy and strategy committee, Empark

emerging and adopted data standards meets the needs of the parking industry (public and private sector) and parking customers as well as other stakeholders, to develop and update parking standards to enable the interoperable deployment of smarter parking schemes, and to facilitate the introduction of Connected and Autonomous Vehicles (CAV).

"The Alliance has a challenging task. It is an ambitious initiative that will help shape the future of our sector," says Nigel Williams, chair of the new alliance and chair of the BPA board. He added: "We are particularly grateful to the UK Department for Transport for the funding they have provided to the BPA to help develop the new parking data standard."

Laurence Bannerman, president of the European Parking Association, says that the use of data will provide a cornerstone for future development in the world of urban mobility. He says: "There is a recognized need for an appropriate standard for parking data. We are confident that in responding to this important challenge, we will enhance the potential force of the parking sector in a field that is of great interest to the political and industrial sectors and reinforce the positions of our members, both large and small."

And Shawn Conrad, CEO of IPI, who will serve as CEO of the alliance, believes that the coalition will pave the way for a more connected world. He says: "By being able to share standardised data with our global counterparts, we can facilitate the seamless adoption and execution of car-sharing, ride-sharing, prepaid parking, dynamic pricing, remote management of facilities, reporting, and much more. This will allow parking innovators to focus their resources on developing new services and operations rather than expending effort to connect technology solutions to each other."

The consumer demands a more intelligent, technology driven environment and delivering on that demand will take more communication and data sharing. If well implemented, the union could help deliver reduced congestion, reduced pollution, simpler and more efficient transport planning, ticketing, and introducing new mobility systems such as car sharing, EV charging networks and the management of on-demand taxis services. Time will tell what the alliance will bring, but it is easy to speculate that whatever it does will be a step for progress in the global parking industry.



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MORE WAYS \$ TO PAY

The evolution of payment methods

With the rise of contactless and mobile payments, there has been a significant increase in the number of ways consumers are able to pay for their parking. People expect entering and exiting a car park to be an uninterrupted experience and so it has been a goal across the industry to make it as easy as possible, with app payments, the use of smart barriers and ANPR technology and so on. The latest in an elongating line of solutions comes from digital parking services provider, EasyPark, and mobile technology company, Fortumo.

The solution, which is currently accessible to users in

Norway, Finland and Sweden, allows Premium SMS users to charge their parking to their mobile phone bill. The only action that is required is for users to send a text message to EasyPark with the relevant information – car registration number, parking zone, length of stay. EasyPark communicates with the car park's owner while Fortumo handles the revenue collection and reconciliation from mobile operators.

“Modern carrier billing infrastructure has commercial terms and technical features that bring it on par with card-based payments,” explains Andrea Boettie, VP of global businesses development at Fortumo. “This creates new growth opportunities for our telco partners for whom it becomes



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possible to tap into business beyond the digital economy. We look forward to making users lives easier by giving them access to a simple and secure payment solution.”

“We chose to work with Fortumo because of their proven technical excellence and future proof solutions,” says said Johan Birgersson, EasyPark Group CEO. “It’s through partnerships such as this that we are ensuring EasyPark customers always have access to the very latest and most secure technologies available.”

This new form of payment, sending a simple text, is indicative again that consumers are looking for the optimal, least painful way to pay for their parking. They don’t want to be impeded on their shopping trip by having to worry about getting back to their car in time or if they’ll have enough change to pay for their stay, and methods such as this take away that immediate worry.

The increasing number of ways to pay are making it easier for consumers to be in control of their parking experience, and the UK is crammed with the number of parking apps available. “These apps have proven popular because they help drivers overcome one of the most time consuming, environmentally damaging and frustrating aspects of parking – finding an available space within a specified area at a reasonable price,” says Keith Williams, technical direc-

tor at parking consultancy firm Parking Matters.

“Their arrival,” he continues, “constituted the first phase of a revolution for parking consumers and signalled a shift in focus for the parking industry. These new apps form part of what the British Parking Association calls the “Positive Parking Agenda”. They give customers information, choices and greater control over their parking, reflecting the new reality that shoppers and visitors increasingly need to be wooed.”

It is not enough to just have an app or a smart payment solution. The parking industry is a competitive landscape and it’s going to take connectivity and communication to win the favour of consumers. Williams says that Digital visibility – ensuring that apps and their users are aware of what’s on offer – will be key to the success of towns and cities. With so much data at their fingertips, customers will know what their options are and will choose the best available. “Going forward,” he says, “if you’re not on the map you simply won’t exist and if no convenient parking is available, then cars and apps will recommend alternative destinations.

“This fundamental change will essentially alter the way that towns, cities and parking operators approach consumers. Proactive strategies for creating online visibility will become an absolute must. Those who have taken their first steps are already ahead of the game,” Williams concludes.

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The abuse and misuse of disabled parking bays needs to be better addressed

In the UK there are around 7m people of working age who have a disability, with their combined spending power, known as the 'purple pound' estimated to be worth around £249bn. The car park is the first and last touchpoint for many shoppers on their journey and so unwanted disruption here can be the lasting memory of a shopping trip. Many disabled consumers already face a large number of obstacles when it comes to what, for most, should be a simple shopping trip. Ensuring the car park is not one of the obstacles can help improve the reputation of a centre within the disabled community.

The former National Fraud Authority estimated that the misuse of the UK's Blue Badge parking scheme cost £46m in fraudulent use per year, with many local authorities lacking adequate penalty policies or the resource to enforce them. In other words, people are regularly abusing the disabled parking bays and little is being done to stop them.

In a bid to understand and better regulate the blue badge system, the British Parking Association (BPA) worked with

the European Parking Association (EPA) in commissioning research from the London South Bank University (LSBU) to collect data on blue badge schemes across Europe. The investigation set out objective parameters, collecting information that examined: the eligibility criteria, lifespan, and concession available for Blue Badge holders across the continent. The intention was that in collecting the information there would be a basis on which to improve the service for genuine Blue Badge holders to enforce the scheme more efficiently and reduce its misuse.

The LSBU research revealed a number of general practices that were consistent across most countries, with 22 of those examined showing that Blue Badge application requires health status checks and approval from local authority, as well as most requiring a nominal fee. The significant differences, however, were the lifespan of a badge, ranging from yearly renewals in some countries to lifetime membership in others. The average Blue Badge lifespan is five years, with the UK coming in under that at three years.



The research also found that while card holders were permitted cross-country usage within the EU, there is no common platform to obtain information on how to do this. As a result, it has become a goal of the BPA in working with the EPA to develop a consistent approach to the overall process and execution of the Blue Badge scheme across the continent and establishment of a centralised web-based service hub providing a European Register for Blue Badge Schemes.

Access to parking spaces is just one point of frustration for disabled shoppers. Another common problem is difficulty accessing payment machines. While there is a progression towards mobile payment, most car parks still operate with payment machines, and the layout and height of these machines can make it difficult for some disabled drivers to pay for their stay.

A new pay station from Czech parking systems supplier Green Center has been designed to prevent this from being an issue. The machine has a front panel with logical distribution of elements and the height of the paystation allows trouble-free operation. The system has undergone successful practical testing to ensure its accessibility to disabled users.

The crux of the matter is that a disabled shopper already has enough to contend with on a shopping trip and managers should be doing as much as possible to make the car park a welcoming, easy access, undisruptive environment in paving the way to become an fully inclusive centre.

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GIANT STEPS FOR MERCURY MALL

London scheme launches interactive energy and data harvesting technology

Elandi's Mercury Mall community shopping centre in Romford, East London, is converting footsteps of visitors into rewards in a global first for shopping centres. The project embraces renewable energies and clean technology by introducing an energy and data walkway at the centre's entrance.

The new entrance walkway will convert the kinetic energy of up to 60,000 customers' footsteps per day, earning them 'Smart Rewards' points to spend in the centre while generating off-grid electricity to power services. The 6 sq m system, designed by award-winning UK firm Pavegen, will display the off-grid energy on screens, notify of new rewards while producing data on footfall.

The walkway is the latest in a series of sustainability initiatives for The Mercury, which has already installed solar panels, invested in the latest highly efficient heating systems and will achieve zero waste to landfill in 2018. But unlike other 'silent' eco-friendly initiatives that the centre has invested in, customers will physically experience the energy and technology and be rewarded via the Smart Rewards app, in this positive awareness-raising installation.

The walkway will be providing customers with information on how much off-grid electricity their footsteps are generating via screens above the walkway. By checking on the Mercury Smart Rewards app, customers will be able to convert this energy into personal 'Smart Rewards' points

for discounts and offers at the centre.

Centre manager Spencer Hawken says: "The exciting thing about the walkway is that it gives our customers a chance to play their part in our sustainability story, simply by walking into the centre.

"As a community shopping centre, our loyal customers choose to shop local and often – it fits around their daily lives and offers them value for money and sociability; this is a great way for customers to have a real social impact for every step they make in their physical journey. The whole idea is that sustainability should be fun and engaging – this installation is a visual place maker and when customers realise that their steps will be converted into reward points that they can spend here in our shops, that's a win-win for all of us."

The Mercury is an appropriate location for this ground-breaking environmental technology. Romford, with over 6,000 new businesses a year is the UK's start-up capital and the town is the seat of the London borough of Havering, London's fastest growing hub for tech enterprises.

The shopping centre of the future needs to offer extensive choice. It also needs to be technologically robust, engaging and offer interactive experiences to captivate habitual shoppers. By combining a new technology, enhancing customer experience, making use of big data and maximising space, the Mercury can reap the rewards of a rapidly changing landscape.

THE FUTURE OF RETAIL NAVIGATION

Outdoor navigation technology matured years ago and now we all walk around with a detailed map of the world in our pockets. But what happens when you enter a building? The navigation drops out. João Fernandes has a solution

Not only does this make life more difficult, it also leaves customers to wander aimlessly around the shopping centre looking for specific brands or, worse yet, not even being aware that the brand has a store in your mall.

Fortunately, solutions to this particular problem have already been developed. Most use Bluetooth beacons positioned around the interior of a shopping centre to ping a user's mobile device, allowing an app to pinpoint the user's location to within a few feet.

These beacons are steadily becoming cheaper and more reliable, making them a cost-effective solution for most large and complex indoor environments like shopping centres. Yet, every complex environment has its own unique technical challenges to be ironed out, meaning indoor navigation requires an expert consultancy rather than a DIY approach.

BuzzStreets, for example, is working on a number of pilot projects with hospitals, offices, and stadiums to iron out these kinks, while Google offers DIY indoor mapping without navigation features.

In the very near future, we will see the combination of these technologies, providing a quick and simple solution for shopping centres. At this point, we will quickly reach a critical mass of retailers and other businesses providing indoor navigation, making the whole world will be navigable – indoors and out.

Indoor environments – particularly commercial spaces like shopping centres – will need to change in order to continue to attract shoppers and fend off the growing ecommerce sector. To do this, shopping malls and individual stores will offer shopping experiences.

Imagine going into a shopping centres and seeing marine animals swimming through the air, with games and news appearing on virtual screens around you. As you approach your favourite footwear shop you can already see whether

they have the shoes you wanted before receiving a special discount code. As you step inside the lighting changes and your favourite band plays softly in the corner.

Again, this isn't necessarily a sci-fi vision. BuzzStreets and others have already been playing around with augmented reality (AR) ideas such as these to offer shoppers a rich, immersive environment to explore. When handsfree, wearable devices become the mainstream, this futuristic vision will become a reality. Until then, we will still need to use our smartphones and tablets as a window to this world.

Data is the new oil. And anonymous navigation data also holds a great power: the ability to transform the world. For thousands of years we've been improving our venues, businesses, and movement of people through a combination of guesswork and the scientific method. Results are slow to come and never seem to capture the whole picture. Gathering data in real-time allows us to put our theories to the test, develop new models, and make useful changes quickly and accurately.

Among the key issues facing mall operators are: How do people move around your shopping centre? Where does your shopping centre get the highest footfall? What route do they take to the car park? When are people most likely to buy food?

Data can help answer all of these questions and many more. Shopping centres can use this data to optimise their environments to improve the user experience, save money, and market their available retail spaces.

If a specific area of your shopping centre gets particularly high foot traffic, for example, the retail space around it may be worth a lot more. Centre owners can then maximise the value of their space. Or perhaps you are planning an event in your shopping centre but want to cause the minimum of disruption. Data can help you understand the ideal location to host the event.



→ João Fernandes is the founder and CEO of BuzzStreets

Outlets outperform

Outlet malls across Europe are continuing to attract increased shopper numbers, driving strong leasing and investment performance, according to FSP's annual European Outlet Shopping Report.

The report shows that the outlet format is one of the most successful retail channels for growth, avoiding the ongoing decline affecting traditional high streets and full-price shopping malls. Sales have risen by 45 per cent from €11.5bn in 2013 to €16.4bn in 2017, 10 times the general rate of growth in European retail sales. Luxury outlets lead on performance, with 46 per cent more growth than the industry average.

A key trend in market share has emerged with four operators – McArthurGlen, Value Retail, VIA Outlets and Neinver – accounting for 55 per cent of total European centres. This has risen from 47 per cent since 2013.

This year, nine new outlet centres will open across Europe with total gross lettable area of 132,500 sq m. This is a 17 per cent increase in new floor space compared to 2017 and continues the improvement in new development since 2016. Highlight schemes include The Icon Designer Outlet at London's O2 Arena, Zsar Outlet Village in Finland, The Village at Villefontaine in France and Prague The Style Outlets in the Czech Republic.

With outlet floor space provision in Europe increasing by nearly 50 per cent, Western Europe currently presents the strongest expansion opportunities. FSP's findings show that 47 per cent of total purchasing power falls within this region, despite Western Europe accounting for 30 per cent of outlet floorspace and just 36 per cent of turnover. Looking at potential for further development, the report identifies Germany as offering real potential, with opportunities to improve on the many first-generation schemes in France also strong.

FSP's European Outlet Shopping Report shows that growth in the market continues to be driven by brands; in 2013, FSP recorded 4,774 brands in the European outlet industry, with this number reaching 5,461 in 2018, an increase of 14 per cent. Looking at the brands operating today, 2,568 are newcomers since 2013 and 44 of these now have portfolios of five or more stores including Montblanc, Dr Martens, Liu Jo Uomo, O Bag Store, Rebel Queen and Galleries Lafayette.

Consolidation of brand portfolios emerges as a defining feature of the 2018 European outlet industry. FSP found that 40 per cent of the brands trading in 2013 are no longer trading today, including Ecco

Unlimited, Ventilo, Guru and McArthur. This is partly due to the constantly changing needs of brands to dispose of excess stock but also the efforts of operators to drive sales performance. In addition, leading brands are clearly optimising their portfolios to focus on the best performing sites; in addition to opening 10 new stores, Hugo Boss closed nine while Benetton has opened 12 new stores but closed nine.

Ken Gunn, MD at FSP, said: "In many parts of Europe, outlets are a mature business which requires, skill, hard work, innovation and well-judged investment to be successful. The age of growth through expansion may be coming to an end in some parts

of Europe but the age of asset management has a lifetime of opportunities ahead."

Ian Kitchen, partner at KLM Retail, added: "In an ever more challenging retail environment, and while outlets across Europe continue to outperform full price retail, there can be no complacency amongst owners, managers and brands as to continuing success as the sector is not immune to the key issues generally afflicting the retail industry today. Outlets must continue to evolve and need investment and strong management to stay ahead of the game and enhance the customer experience with one of the key drivers for that being the fusion of leisure and outlets."



London leads retailer expansion

London claimed the top spot in 2017 as the most targeted city in Europe for new retail entrants, according to CBRE's annual report, *How Global is the Business of Retail*.

The UK capital saw 49 new retail entrants in 2017, placing it fourth globally following Hong Kong, Dubai, and Taipei. Major brands to open their doors in London last year include Canada Goose, Sonos, Reserved and Arket. F&B and luxury brands were the biggest drivers of new store openings in London, accounting for 33 of the new entrants, 40 per cent of which came from Asia Pacific brands.

The report found that retail brands continued

to expand in 2017 across a wide range of cities globally indicating that the physical store remains fundamental to retailers' omnichannel strategies, and is increasingly important for retailer success in international markets. CBRE identified 123 cities which had at least one new global retail brand open for the first time, 41 per cent of which targeted more than one city.

Globally, the F&B category accounted for 25 per cent of new market entrants last year, up 17 per cent from 2016. Activity in F&B sector has been driven by the shifting consumer preference for experiential retailing which has been a key driver of expansion as

landlords continue to diversify their tenant mix with more experience-orientated brands.

Michael Horwitz, head of Central London retail at CBRE, said: "The retail sector is witnessing a massive transformation due to the growth of e-commerce and a shift in consumer habits. However, the physical store remains a key element in retailers' success. London's innovative nature and access to international consumers creates an ideal environment for retailers looking to expand into the global market. We welcomed some great new brands in 2017, and are set to see some exciting entrants in the year ahead."



Shopping centre pipeline dries up

European shopping centre completions fell by 23 per cent in 2017 according to Cushman & Wakefield's latest *European Shopping Centres* report.

The report found that 3.8 million sq m of new shopping centre space was delivered to the market in 2017, 23 per cent less than in 2016. At the start of 2018 the total European shopping centre floorspace stood at 166.5 million sq m, up 2.3 per cent on 12 months previously.

The report concludes that changing consumer behaviour and the growth of e-commerce have created a challenging environment but also oppor-

tunities for shopping centre owners and retailers and the development pipeline shows 6.6 million sq m set to complete during 2018 and 2019. Within this there will be a significant East-West divide, with Western Europe expected to see a fall in volumes of 21.3 per cent while CEE will experience growth of 12.3 per cent. This will continue the trend over the last decade of Western Europe lagging behind CEE in terms of new space added.

Silvia Jodlowski, senior research analyst at Cushman & Wakefield, said: "The rise of e-commerce, changing consumer behaviour and expectations, development of the technology and still growing

supply have conspired to impact the European shopping centre development and have led to reduced quantity of new floorspace being created. This is particularly the case in Western Europe's more developed market, but also in the CEE region.

"The focus for developers now is on quality of space and placemaking. Developers now consider placemaking a critical component of a successful shopping centre, as a combination of retail, leisure and entertainment still provides a destination which is not replicated online. Well-designed, dynamic and high-quality spaces are crucial to enable owners to attract shoppers and increase customer footfall and dwell time."

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On your bike, Trinity

As the Tour de Yorkshire bike race rolled into Leeds an eye-catching, 31 metre-wide bike was unveiled on the glass dome of Trinity Leeds to welcome riders as they completed the four-day race.

Following weeks of planning, the artwork took five days of painstaking construction to complete, involving a complex, 80-piece jigsaw of yellow vinyl which measures 7,500 sq ft.

David Maddison, general manager

at Trinity Leeds, said: "The Tour de Yorkshire is fabulous event which puts the county on the international map. We wanted to show our support for the race and give it a spectacular welcome to the city.

"It's taken a lot of planning and staff hours to construct but we're delighted with the result. It's the biggest graphic we've ever created – in fact it's so big we've been told it can probably be seen from space."



Westfield prepares for Eid

Europe's first ever Eid shopping festival is coming to Westfield London – the largest shopping centre on the continent – from 23-24 June, featuring fashion, food and entertainment.

The London Eid Festival aims to build a bridge to this lucrative untapped economy for brands and the free event has been organised by the people behind the successful London Muslim Lifestyle Show and London Halal Food Festival.

The event will feature live catwalk shows in the retail destination's Atrium by Modest Fashion Live, pop-up boutique stalls and exclusive offers for Eid shopping at many of the leading brands within the centre. There will also be an array of flavours on offer from the halal street food zone along with live acts including musicians, comedians and performances across the two days.

Much of the activity will be hosted in Westfield Square, the centre's new outdoor entertainment space created as part of a recent £600m expansion opened in its tenth anniversary year.



This month's moves . . .



GVA has appointed a new member to its management board, **TONY BURCHETT**. An experienced management consultant, he was instrumental in the merger of Acuity with GVA, creating the occupier focused workplace specialist, GVA Acuity.



SAVILLS has acquired placemaking specialist Central Management Solutions. Established in 2011 by **PAUL CLEMENT**, CMS employs 28 staff members, all of whom will join Savills with immediate effect. Clement will become head of place shaping. CMS currently provides management support to 11 BID locations and is developing new BID models in Maidstone, Colchester, Royal Tunbridge Wells, Andover and Stoke-On-Trent.



CAPITAL & REGIONAL has made several key hires to its asset management team. **JAMES RAYNER** joins from British Land as leasing executive and **CALLUM BOARD** joins from QIC Global Real Estate as commercial manager. **MIKE MCGUINNESS** joins as a development advisor and former Westfield marketing executive **BROOKE ROWLINGS** joins as special projects manager.



COLLIERS INTERNATIONAL has signed a trio of new recruits to its rating team. **JIM GALLAGHER** joins Colliers' Manchester office as a director from the Valuation Office Agency. **ANDREW STACEY** also joins as a director from Telereal Trillium. **RICHARD PROCTOR** also joins from Telereal Trillium as an associate director in Colliers' London office.

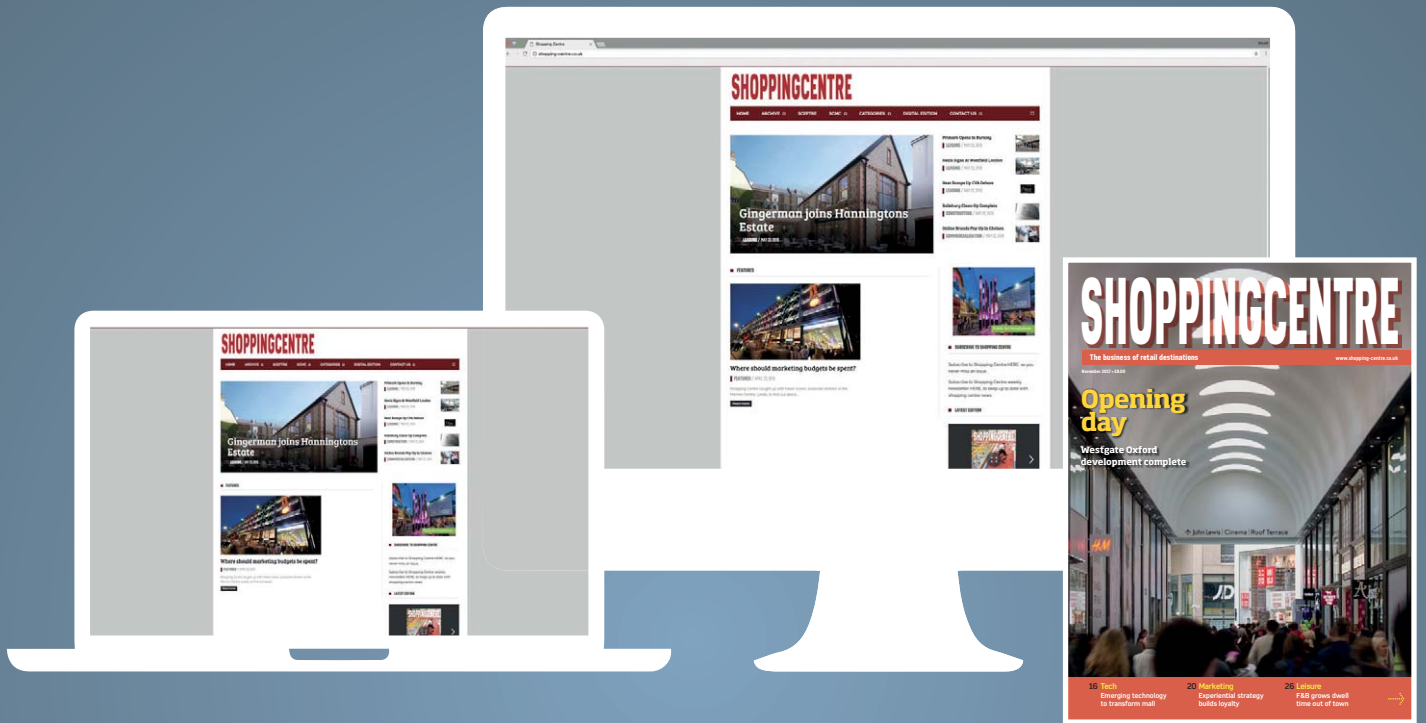


SOVEREIGN CENTROS has promoted **LUKE WINSTANLEY** to investment director and **GUY BEAUMONT** to development director. Winstanley joined in 2013 and notable acquisitions include One Stop Perry Barr, Birmingham and Corby Town Centre. Beaumont is responsible for projects at Telford Shopping centre, St Enoch in Glasgow and Trinity Walk in Wakefield.



LIFESTYLE OUTLETS is expanding its leasing team to manage the company's growing portfolio of outlets in Manchester, Gloucester and Glasgow. **DAVID CHARLTON** joins from Savills while **BEN HEY** also joins from Bruntwood and Orbit Developments. He previously worked for Lambert Smith Hampton.

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