# Victoria
## Retail Health Check

Commissioned from The Retail Group by Victoria Business Improvement District and Westminster City Council.

2013

# Foreword

In December 2012, Westminster City Council commissioned the Retail Group to undertake Retail Health Checks* for 10 of its high street style shopping centres across the City of Westminster, which provide a thorough Health Check for each respective area demonstrating individual and relative performance, providing robust, quality research and recommendations for each area.

The Victoria BID commissioned an additional study of Victoria, working closely with The Retail Group and Westminster City Council.  Our aim at Victoria BID is to maintain and advance the quality, vitality and sustainability of this major shopping destination, promoting Victoria as a destination of choice and extending customers' options as stated in the current National Planning Policy Framework (NPPF) guidance.

# Victoria: 2013 Health Check Report

**Contents:**

# 1. Background and Introduction

1.1 The Retail Group was appointed in December 2012, following a competitive tender process, to undertake Health Checks on a series of high street style shopping centres across Westminster. These include (with the London Plan / Westminster City Council Core Strategy Town Centre Hierarchy designation in brackets):

- Warwick Way / Tachbrook Street (CAZ Shopping Frontage)
- Church Street / Edgware Road (District Shopping Centre)
- Harrow Road (Shopping Centre)
- Queensway / Westbourne Grove (Major Shopping Centre)
- Marylebone High Street (CAZ Shopping Frontage)
- St. John's Wood High Street (District Shopping Centre)
- Praed Street (District Shopping Centre)
- Berwick Street (other CAZ Shopping Centre)
- Edgware Road (South) (CAZ Shopping Frontage)
- Baker Street (South) (CAZ Shopping Frontage)
- Victoria (including the CAZ Shopping Frontage Victoria Street).

1.2 This report focuses on the Victoria Shopping Centre, which is defined as covering the following area:
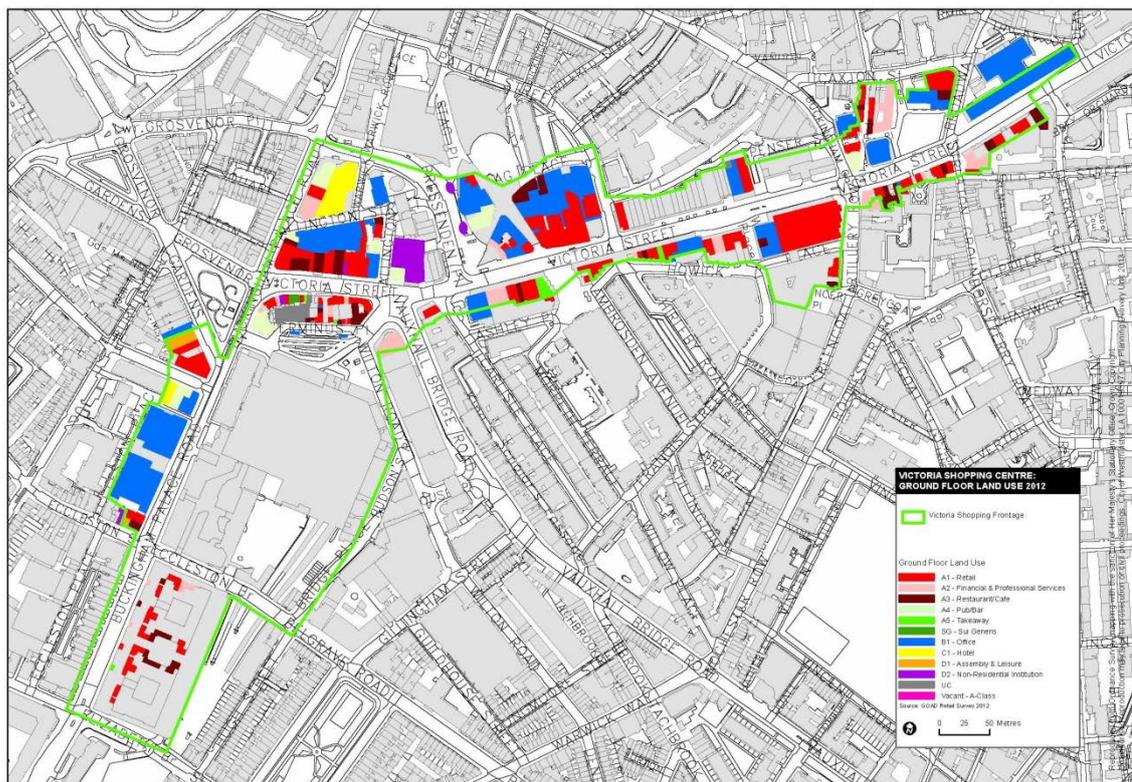


*FIGURE 1: VICTORIA RETAIL SURVEY BOUNDARY AND LAND USES 2012*

# 1. Background and Introduction

1.3 The Victoria Shopping Centre links the various components of the Victoria Transport Interchange along Victoria Street towards the Palace of Westminster and Westminster Abbey. It is a very busy area, with significant workforce and linkages to many key Central London tourist destinations. Hence many commuters, tourists and leisure visitors access the area as their main point of arrival into or from Central London. The area is experiencing significant development and building activity currently and the local built environment is set to be vastly altered over the next 5 years.

1.4 The aims of the Health Check are to assess the Victoria area on a variety of measures to form a picture of its health and vitality.

1.5 A number of primary research studies have been undertaken. These include a **Shopper Survey** of 150 consumers on street (over three weekdays and a Saturday in May / June – actual dates detailed in Section 3.0). The aim is to identify who is using each centre, why, how they are using it, how they rate the centre on a series of measures and variables and how they would like the centre to change going forward.

1.6 Whilst undertaking the consumer surveys, our researchers also undertook a **Footfall Study** (between 10 and 17.00 on the same days of the consumer survey above, as well as between 17.00 and 19.00 on 11 June), assessing a number of nominated points in each location and counting passing footfall for 5 mins in each direction .

1.7 To capture the views of operators trading in the location, we undertook a **Trader Survey** (on 26 April) using a direct response method. This method achieves the highest response rates in our experience. 100 surveys were handed out face to face to traders and then completed surveys picked up the same day by our researchers. This survey probes local operator experience, trading patterns, views and opinions, aspirations, improvements wanted and ratings on a variety of measures similar to the consumer survey. All types of consumer facing businesses were invited to participate, including multiples, independents, comparison, convenience, service and catering / pubs / bars.

1.8 We undertook a **Location Audit** assessing the retail environment from a consumer perspective and assessed customer facilities, streetscape, cleanliness, signage, ease of movement and access to public transport. We also captured a series of visual indicators of health and vitality, including a photo audit of visual examples. Audits also included an assessment of the Food & Beverage (F&B) & night time offer and facilities.

1.9 In terms of secondary data, we were given access to a variety of available research which we used to add further layers of health and vitality assessment. These included:

- The Council's latest (2012) floorspace assessment of Experian GOAD's land use survey
- Information on crime and disorder statistics from the Council
- Station usage figures from Transport for London (TfL)
- BasePoint Data survey of bus usage commissioned by the Council
- Rents and yield data as captured from CoStar Focus.

1.10 All of the findings of the research, both captured as well as accessed in this study have been analysed individually and as a data set to draw conclusions together for the location in terms of its current health and vitality and how this compares to previous assessments carried out in 2008.

1.11 This then leads to an analysis in terms of the future prognosis for the location, as well as what the retail centre needs in terms of anchors, initiatives and interventions to help improve its health and vitality going forward. This includes an assessment against the principles of the Portas Review 2011.

# 2.  Floorspace Breakdown and Analysis

This section examines the mix of town centre uses in Victoria.  Survey data of retail units has been analysed to understand the viability of shopping centres across Westminster. Although a health check was undertaken for the area in 2008, the boundary was solely focussed on Victoria Street and therefore the research findings are not comparable to those presented below, and have therefore not been incorporated into this study. The units inside Victoria Station are also excluded from the analysis as they have no frontage on Victoria Street or Buckingham Palace Road.

### 2.1    Total Retail Floorspace

2.1.1  Total retail floorspace in Victoria (excluding Victoria Station, see section 2.5.3 below) is 26,719 sqm. The breakdown of different retail uses in table 1 shows that A1 comparison floorspace is the largest retail use with 7,617 sqm. and the second largest is A3 restaurant / cafe use with 4,747 sqm.

2.1.2  The current retail floor space is affected by the significant amounts of regeneration and redevelopment occurring throughout the study boundary, with entire blocks under redevelopment at present, which in the near future will provide significant amounts of additional retail floor space.

*TABLE 1: BREAKDOWN OF RETAIL FLOORSPACE IN VICTORIA*

| 2012 | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | A1 Conv* | A1 Comp* | A2 | A3 | A4 | A5 | SG | Vacant | Total |
| **Floorspace sqm** | 3,351 | 7,617 | 3,64 | 4,74 | 3,51 | 777 | 105 | 2,961 | **26,71 9** |
| **%** | 12.5 % | 28.5 % | 13.6 | 17.8 | 13.2 | 2.9 | 0.4 % | 11.1 % | **100.0 %** |

\* Conv = Convenience and Comp = Comparison, A1 = Shops, A2 =. Financial and Professional Services, A3 = Restaurants & Cafes &, A4 = Drinking Establishments, A5 = Hot Food Takeaways and SG = Sui Generis
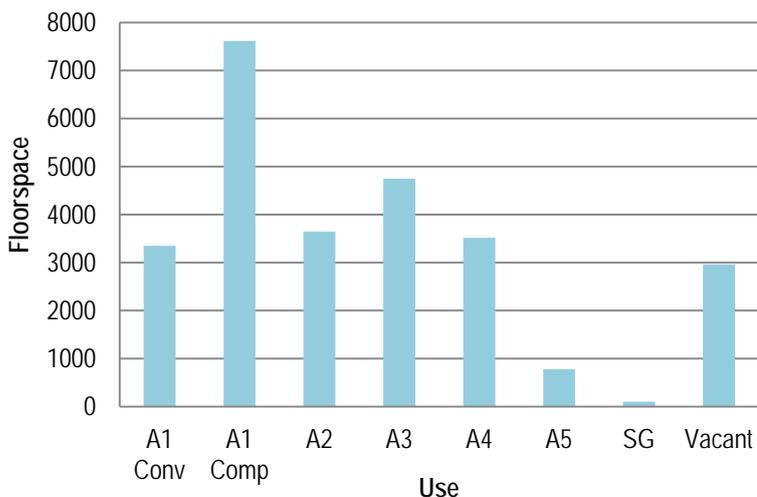


**Findings**

A1 comparison floorspace has the largest share of floorspace in the shopping centre with 7,617 sqm.

A3 restaurant / café has the second largest share of floorspace with 4,747 sqm in 2012.

A1 convenience has the fourth largest share of floorspace with 3,351 sqm.

*FIGURE 2: RETAIL FLOORSPACE 2012*

# 2. Floorspace Breakdown and Analysis

## 2.2    Retail Floorspace in Victoria Shopping Centre



Vacant floorspace has the sixth largest share of floorspace with 11.1%. This is almost exclusively comprised of sites currently being redeveloped.

A1 comparison floorspace has the largest share with 28.5%.

A4 pub / bar has the fifth largest share with 13.2% of total retail floor space.

A3 restaurant / café has the second largest share of retail floorspace with 17.8%.

This includes a number of high street banks.

*FIGURE 3: COMPARISON OF TOTAL RETAIL FLOORSPACE 2012*

2.2.1   The 2008 survey of the smaller Victoria Street CAZ Frontage recorded just over 50 % of the units as A1, 18 % as A2 and 23 % as A3-5.  Vacancy levels at that time (for the smaller area) were 4.4 %.

## 2.3    Vacancy Levels

2.3.1   Vacant floorspace in Victoria in 2012 totalled 2,961 sqm, including several units at Terminus Place, Artillery Row and on Victoria Street itself. The effect and impact of this is hard to rationalise given the amount of redevelopment occurring in Victoria at the moment, meaning that units may be vacant because of regeneration, and not because they cannot be let or are not viable.

## 2.4    Diversity of Use

2.4.1   Victoria is a mixed-use centre, serving local residents, comparison shoppers, workers and tourist visitors, and as such the retail offer reflects this, with predominance towards national chain retailers on Victoria Street itself, which is the main thoroughfare for the area's workers. There are also a significant number of food and drink outlets serving daytime and evening visitors, with concentrations within the Cardinal Place development on Victoria Street, and other parts of the area. Victoria also has several art and cultural uses acting as strong visitor attractions.

Table 2 summarises the diversity of retail and number of units in 2012.

# 2. Floorspace Breakdown and Analysis

## *2.5 Overview of Findings*

| Overall number of retail units is 212 | 101 A1 retail units in Victoria | Three hotel units in 2012 |
|---|---|---|

| 22 vacant units in 2012 | 37 resturant / cafe units in 2012 |
|---|---|

2.5.1 The overall number of retail units in Victoria was 212. There were 33 national retailers and one department store in the area. There were 28 independent retail units, 15 specialist independent units and 24 convenience units. Additionally a mini Waitrose opened in Victoria Street in summer 2013.

2.5.2 There were 21 Financial and professional service (A2) uses in 2012, with banks well represented throughout the centre, with most major banks represented. Restaurants / cafes (A3) had 37 units and Pub / Bar (A4) use had 12 units in Victoria. Takeaway (A5) use remained low with seven units.

*TABLE 2: DIVERSITY OF USES*

| Use Class | | No of Units 2012 | % of Units 2012 |
|---|---|---|---|
| Class A1 Retail | | 101 | 47.6 % |
| | Dept Store / principle stores | 1 | 0.5 % |
| | International retailers* | 0 | 0.0 % |
| | National retailers | 33 | 15.6 % |
| | Specialist Independent | 15 | 7.1 % |
| | Independent | 28 | 13.2 % |
| | Convenience | 24 | 11.3 % |
| Class A2 | Financial Services | 21 | 10.7 % |
| Class A3 | Restaurant / Cafe | 37 | 18.8 % |
| Class A4 | Pub / Bar | 12 | 6.1 % |
| Class A5 | Takeaway | 7 | 3.6 % |
| Sui Generis | | 1 | 0.5 % |
| Vacant Units | | 22 | 11.2 % |
| Arts / Culture | | 6 | 3.0 % |
| Health Uses | | 2 | 1.0 % |
| Hotels | | 3 | 1.5 % |
| **Total** | | 212 | 100.0 % |

Source: GOAD Retail Survey 2012

*International retailers represented in Victoria, include Zara, New Look and L'Occitane. The exact number of international retailers within this survey boundary is currently under review.

## 2. Floorspace Breakdown and Analysis

2.5.3 'Victoria Place' shopping centre within Victoria Station itself contains 7,700 sqm. of additional retail floor space (not included in the tables above), and in July 2013 Network Rail announced a £15m refurbishment and expansion of Victoria Place, with works due for completion in Spring next year.

2.5.4 Whilst major brands such as Next, Boots, Sainsbury's and McDonald's plan to remain in Victoria Place, the scheme proposes over 900 sqm. of additional floor space, taking the total amount up to 8,600 sqm, across 40 units. This retail provision is also complemented by 40 shop units, including a high number of takeaway sandwich outlets, on the main station concourse.

# 3. Consumer Survey

## 3.1 Consumer Breakdown

3.1.1 150 passers-by were stopped and questioned in Victoria on the 28<sup>th</sup> and 31<sup>st</sup> May and the 1<sup>st</sup> and 4<sup>th</sup> June 2013, between 10.00 and 17.00. 67 % of the interviews took place during the week and 32 % at the weekend. 25 % interviewees lived locally and 75 % did not. The split of male and female consumers was equal – 50 % / 50 %. The age breakdown was as per the graph below (figure 4),
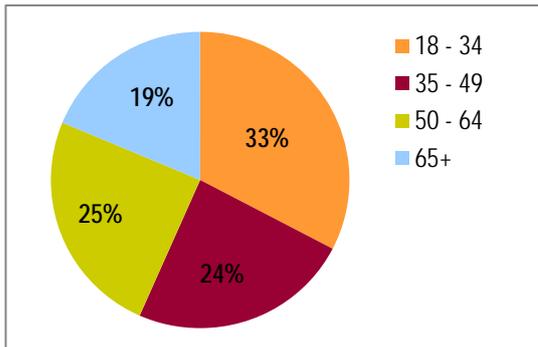


reflecting the demographic of people on the street at that time.

*FIGURE 4: CONSUMER AGE BREAKDOWN*

3.1.2 Victoria attracts quite a mixed-age profile – 33 % were aged 18-34 and a further 24 % aged 35-45, although all age groups were well represented.

## 3.2 Purpose of Visit
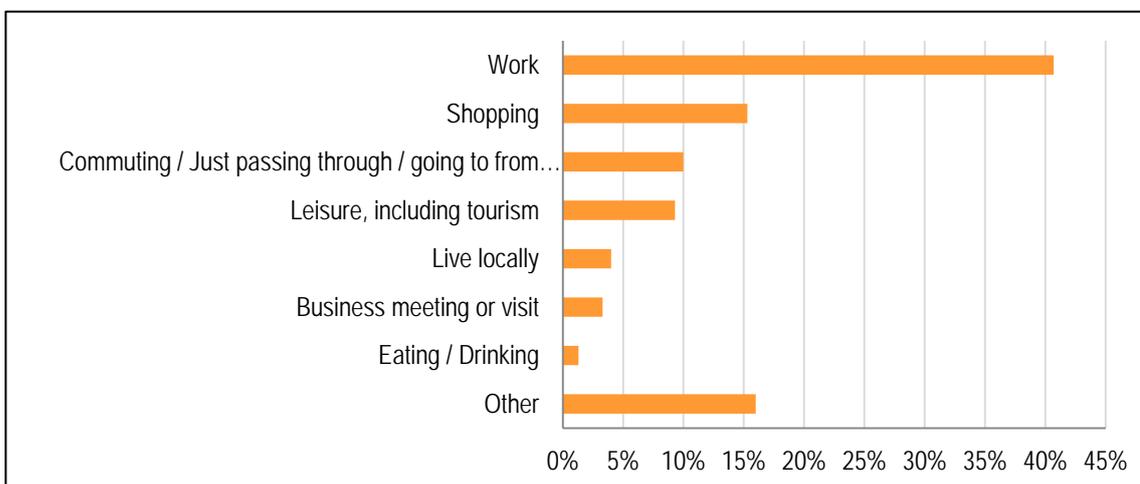


*FIGURE 5: PURPOSE OF VISIT TO VICTORIA*

3.2.1 Victoria is clearly a multi-purpose visit location, although work was the top reason for consumers to be in the area, with 41 % of consumers in the area visiting for this reason. The second most popular answer was shopping at 15 %, and all other reasons gained 10 % or less.  Of those living nearby, shopping was the main reason for 51 % (compared to 4 % of non-residents), while work was the main purpose of visit for 50 % of non-residents (compared to 11 % of local residents).

3.2.2 'Other' reasons for visiting the area included visiting the bank, visiting friends and relatives, using the post office, using the dentist / doctor / optician, visiting the passport office, using the chemist, visiting the library, going to the theatre, paying bills, going to church / mosque / cathedral, going to college / university or using a hairdresser / barbers.

# 3.    Consumer Survey
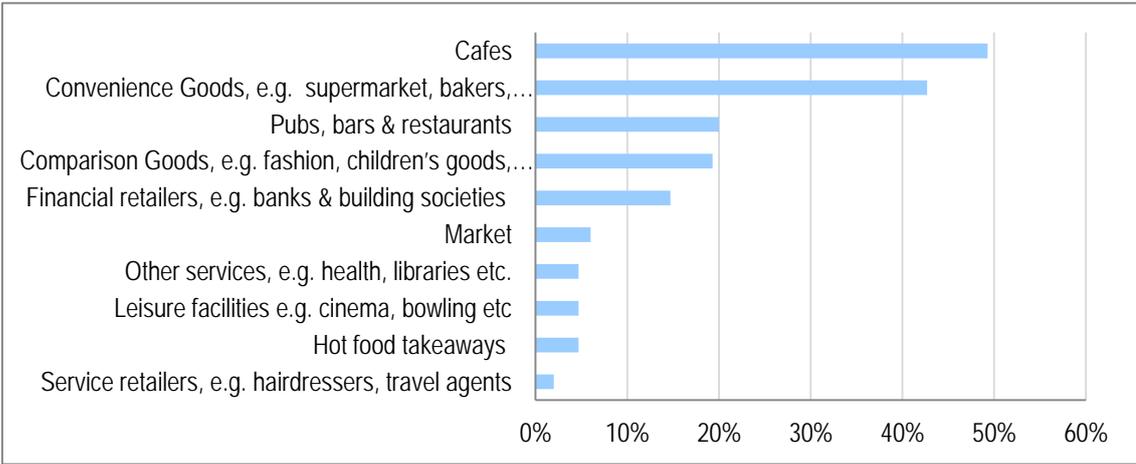


*3.3*    *Which of the following do you intend to buy or use today?*

*FIGURE 6: PLANNED USE BY CONSUMER*

3.3.1   The most popular planned use in the Victoria area was visiting a café, with 49 % planning to visit these. This is the only location out of all 11 in the programme to have cafés as the main response to this question – suggesting that many local workers visit local cafes for their lunch. It is also potentially influenced by the large number of construction workers currently in the area. Convenience goods' shopping was also a popular answer, with 43 % of those questioned responding that they intended to visit convenience goods shops.

3.3.2   Visiting pubs / bars / restaurants, comparison goods shopping and using financial retailers were answers given by between 10 % and 20 %, while other services, leisure facilities and takeaways were less popular choices (less than 5 % of respondents each).

3.3.3   The cafes were more popular for non-residents vs. residents (54 % vs. 35 %), while using financial retailers was more popular for local residents than non-residents (27 % vs. 11 %).

# 3. Consumer Survey

*3.4      What was your main mode of travel to Victoria today?*
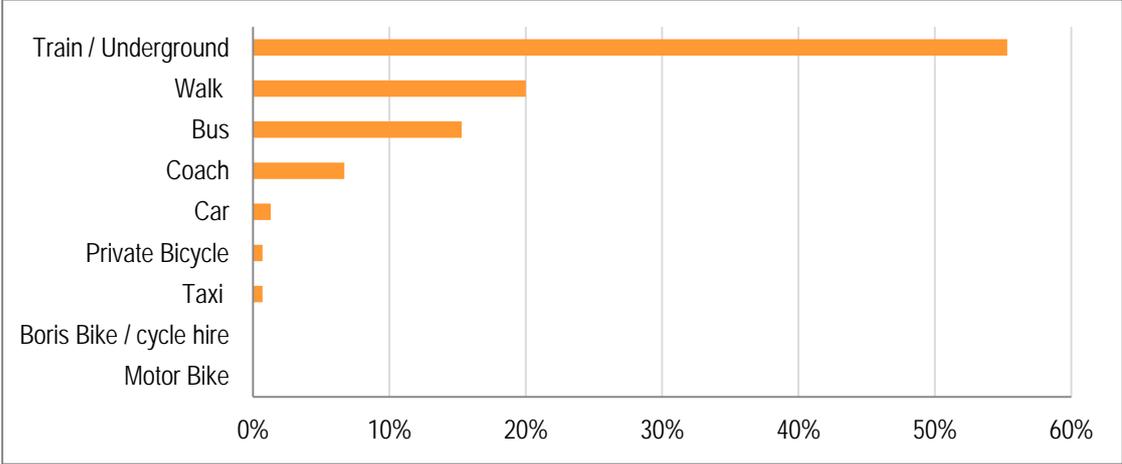


*FIGURE 7: MODE OF TRANSPORT TO VICTORIA*

3.4.1   Train / Underground were by far the most popular mode of transport to Victoria, with 55 % of consumers using this mode of public transport (71 % non-residents vs. 8 % local residents). Walking was the second most popular choice at 20 % (65 % of local residents vs. 5 % non-residents).

3.4.2   15 % arrived by bus, 7 % by coach and 1 % each by car, private bicycle and taxi. None of the consumers surveyed used cycle hire or motor bikes.

3.4.3   Of the 7 % arriving by coach (10 people), 3 said they were there to work, 4 were for leisure / tourist reasons, and 4 said other reasons.

# 3. Consumer Survey

*3.5*    *How often do you typically shop in Victoria during the daytime?*
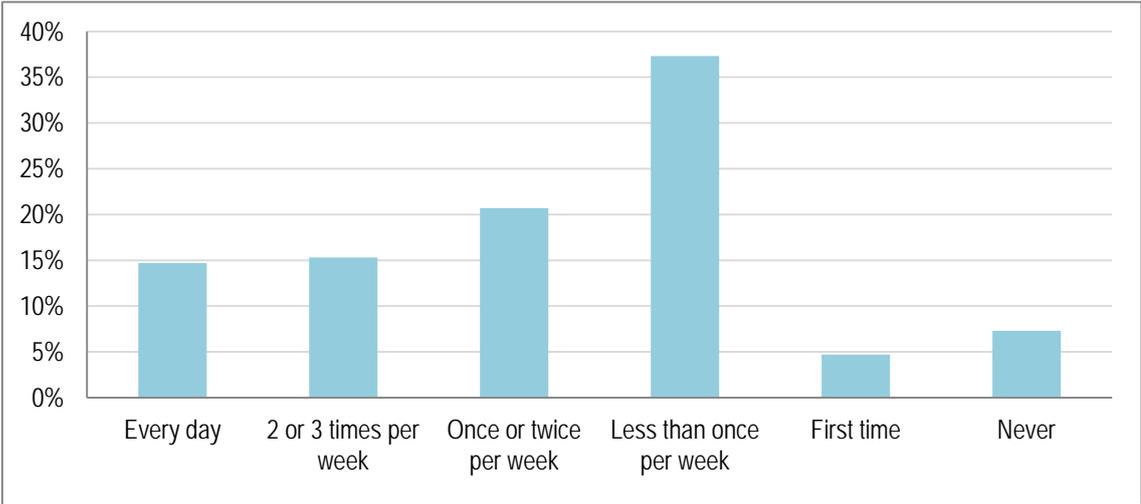


*FIGURE 8: FREQUENCY OF USE BY CONSUMER*

3.5.1    Shopping visit patterns are quite varied. While 37 % shop at Victoria less than once per week, there are 15 % shopping here every day, 15 % 2 or 3 times per week and 21 % once or twice per week. This is likely to be a result of the multi-visit trip pattern. In particular, the dominant less than once a week pattern will be a function of those being in the area for business meetings or tourist and leisure reasons.

3.5.2    Local residents are the most frequent shoppers, with 30 % shopping here every day (compared to 10 % non-residents).

3.5.3    This figure may be skewed by workers popping to convenience shops in their lunch breaks, not considering that they are "shopping".

# 3. Consumer Survey

*3.6 Thinking generally, what would encourage you to shop or visit here more often?*
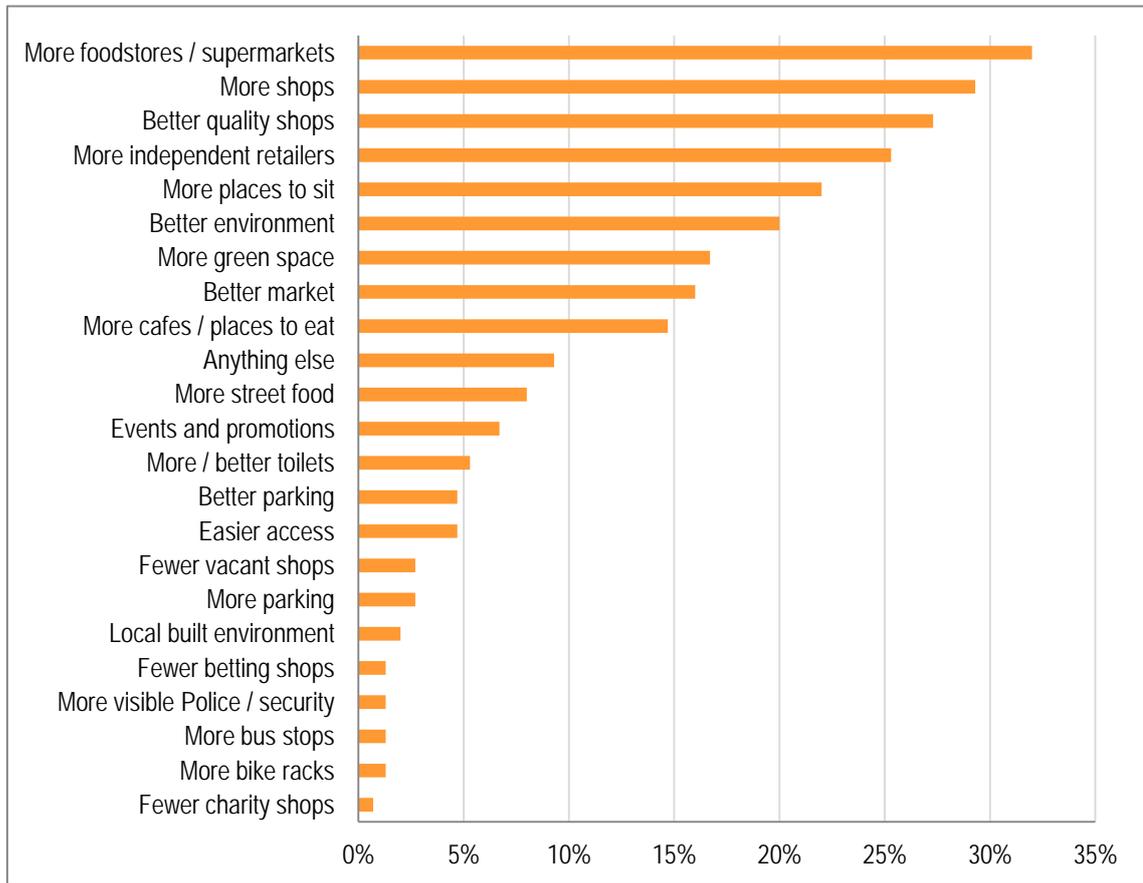


*FIGURE 9: HOW TO ENCOURAGE MORE VISITS TO VICTORIA*

3.6.1 Consumers would like to see an improvement to the offer at Victoria more than an improvement to the environment, with more and better shops being the most popular answers to this question; in particular, more food stores / supermarkets (32 %), better quality shops (27 %) and more independent retailers (25 %). These were the top answers for both residents and non-residents.

3.6.2 Other areas mentioned include better value shops, fewer tourist shops, fewer estate agents, cheaper foods, better access / parking, a local / farmers market, fewer beggars, less noise, a Post Office, chiropodist, Waitrose and better pubs / bars / restaurants.

3.6.3 Since the surveys were carried out, a new Waitrose mini has opened at 62 Victoria Street – adding to the number of food stores in the area.  New and additional shops are being created adjacent to this at 62 Buckingham Gate, and further west along Victoria Street, most noticeably at Kings Gate, and to the north of Victoria Station at 'Nova'.  These schemes will include more enhanced public realm, including additional places to sit and will help address some of the concerns raised above.

3.6.4 The Victoria BID has successfully implemented a living wall at the Reubens Hotel and a Diamond garden close to Buckingham Palace.  They are investigating options for additional green infrastructure through their 'Clean and Green' Strategy and are going to install a rain garden outside the John Lewis headquarters in Victoria Street in the autumn.  Land Securities is also investigating options for Strutton Ground Market, and other street trading opportunities within their schemes.

3.6.5 Bus provision in the area is being reviewed through the Mayor's Roads Task Force.

# 3.  Consumer Survey

*3.7   Are you shopping here more or less than you were a year ago?*
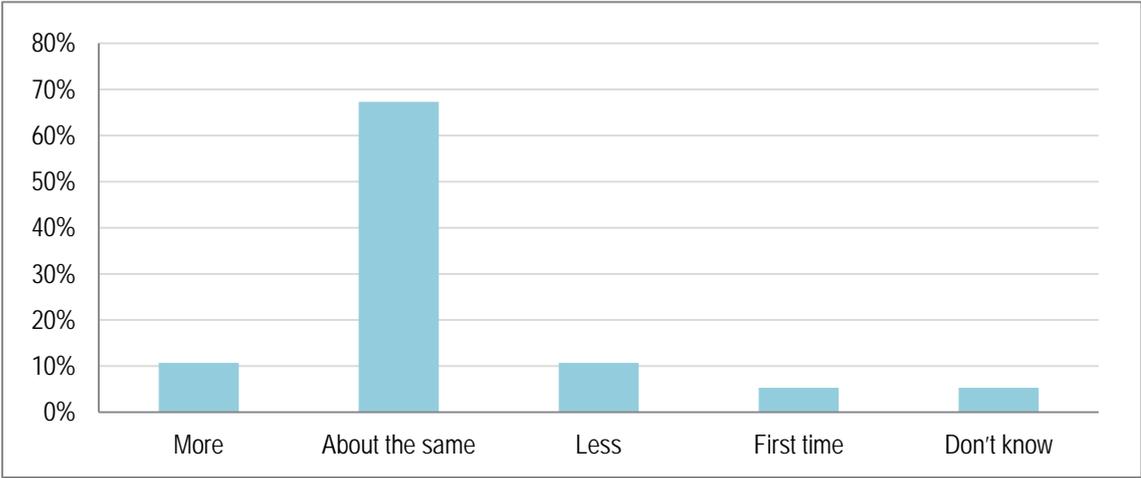


*FIGURE 10: VISIT PROPENSITY*

3.7.1   The vast majority, 67 % of consumers, are shopping at Victoria about the same as last year. 11 % are shopping here more and 11 % less, while 5 % were on their first visit to the area and 6 % responded that they were unsure.

3.7.2   Those who said they were shopping in the area more than last year stated that they were doing so because they work here, have moved to the area, there are better shops now or they are visiting friends / relatives. Those visiting less said this was because the area is unattractive as a result of demolition / shops gone (10 people), shops have closed down (3), shopping is better elsewhere (4), they've moved away (3), their reason for coming has changed (2) or it is too expensive (2).

3.7.3   The currently unoccupied development sites and high levels of construction in the area may have deterred some visitors from visiting more often.

# 3.  Consumer Survey

*3.8    Please rate Victoria in relation to the following factors*
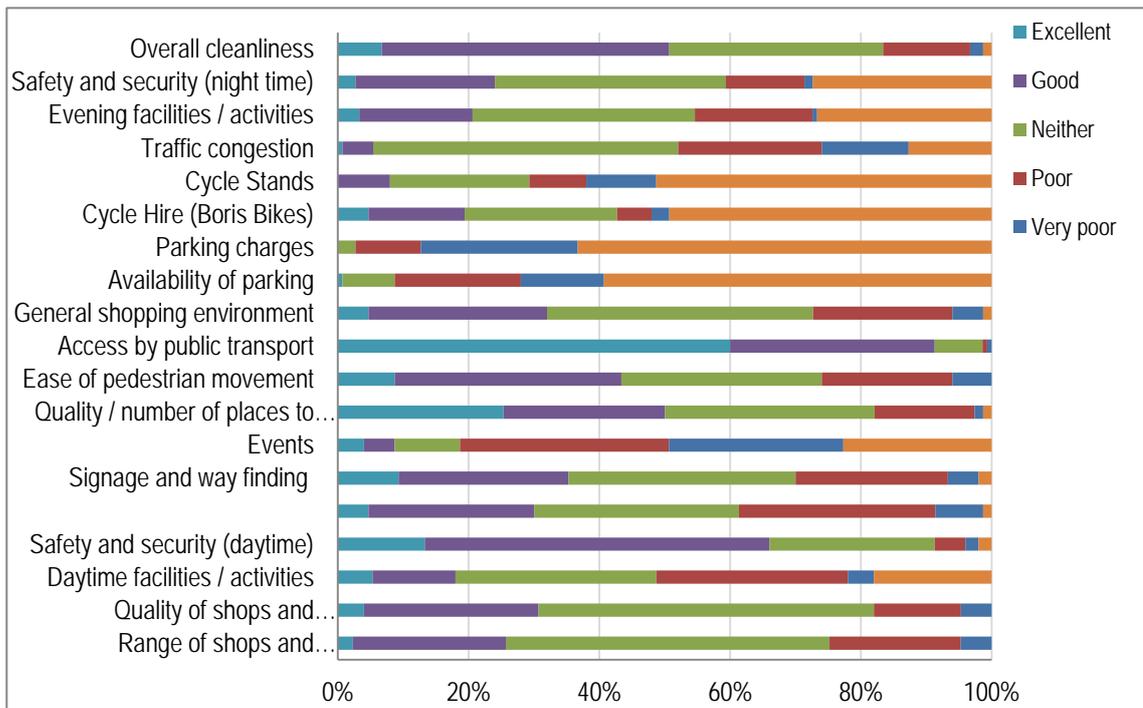


*FIGURE 11: CONSUMER SATISFACTION LEVELS*

3.8.1   The most favourably rated areas included access by public transport (60 % excellent, 31 % good), quality / number of places to eat / drink (25 % excellent, 25 % good), safety and security – daytime (13 % excellent, 53 % good) and overall cleanliness (7 % excellent, 44 % good).  The least favourably rated areas were events (27 % very poor, 32 % poor), car parking charges (24 % very poor, 10 % poor), car parking availability (13 % very poor, 19 % poor) and liveliness / street life / character (7 % very poor, 30 % poor).

3.8.2   Overall ratings for Victoria were neither heavily weighted towards positive or negative. There were a number of areas that consumers were unsure of, including parking charges (63 % don't know), availability of parking (59 %), cycle stands (51 % don't know), cycle hire (49 % don't know), safety and security – night time (27 %), evening facilities and activities (27 % don't know), events (23 % don't know) and daytime facilities / activities (18 % don't know).

3.8.3   Victoria was considered by consumers typically to be cleaner than other centres surveyed. This may be reflective of the Council's street cleansing regime together with the Victoria BID's 'Clean' agenda and private local management of Cardinal Place and other local schemes.

# 3.  Consumer Survey

*3.9*   *Now, thinking specifically about particular types of shops or retailers, are there any specific products or retailers that are currently missing that you would like to see in Victoria?*
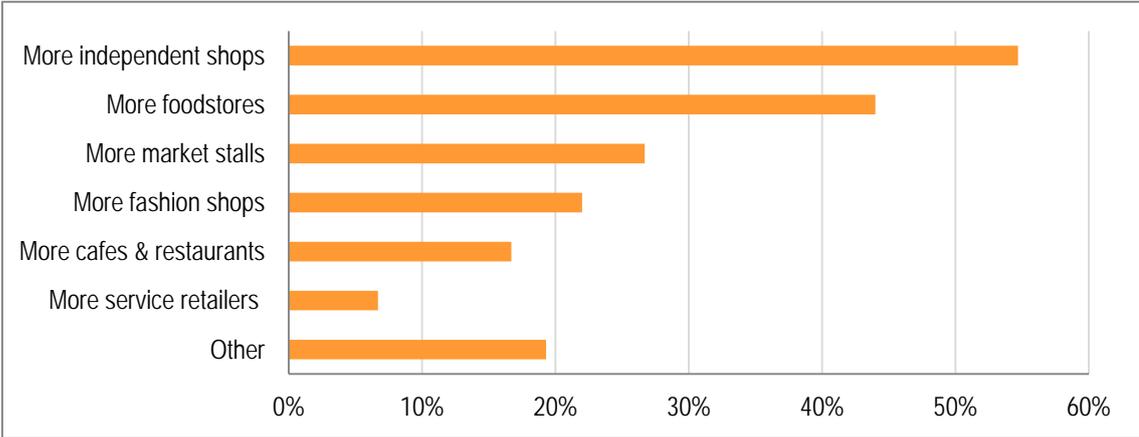


*FIGURE 12: MISSING PRODUCT CATEGORIES*

3.9.1   Consumers would most like to see more independent shops at Victoria (55 % of those questioned mentioned this), as well as more food stores (44 %). More market stalls were cited by 27 %, more fashion shops by 22 % and more cafes and restaurants by 17 %.  More service retailers were only cited by 7 %.

3.9.2   'Other' specific types of shops / retailers that consumers wanted to see in Victoria included better supermarkets, more gift shops, bigger variety of shops, accessories, independent cafes / restaurants, Tourist Information, natural / organic food shops, a book store, greengrocer, English butchers, bakers, ethnic food shop, local facilities and a camera shop.

# 3.  Consumer Survey

***3.10  Have you noticed any improvements to the general environment of Victoria in the last 12***
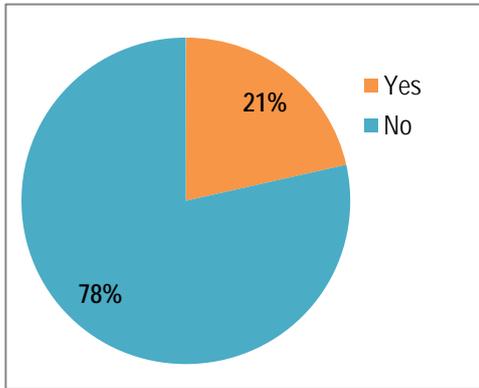


***months?***

*FIGURE 13: OBSERVATION OF ENVIRONMENTAL CHANGE*

3.10.1 78 % of consumers had not noticed any improvements to the general environment of Victoria in the last year.

3.10.2 Improvements that were noticed by the remaining 22 % included BID promotions, building refurbishments / development, better roads and pavements, new cafes / restaurants, better tourist facilities, better transport and more police / security. This is one of the highest levels in the study programme, and is a result of the active and effective Business Improvement District (BID), as well as considerable redevelopment activity that is underway.

***3.11  How often do you visit or use the leisure facilities in Victoria?***
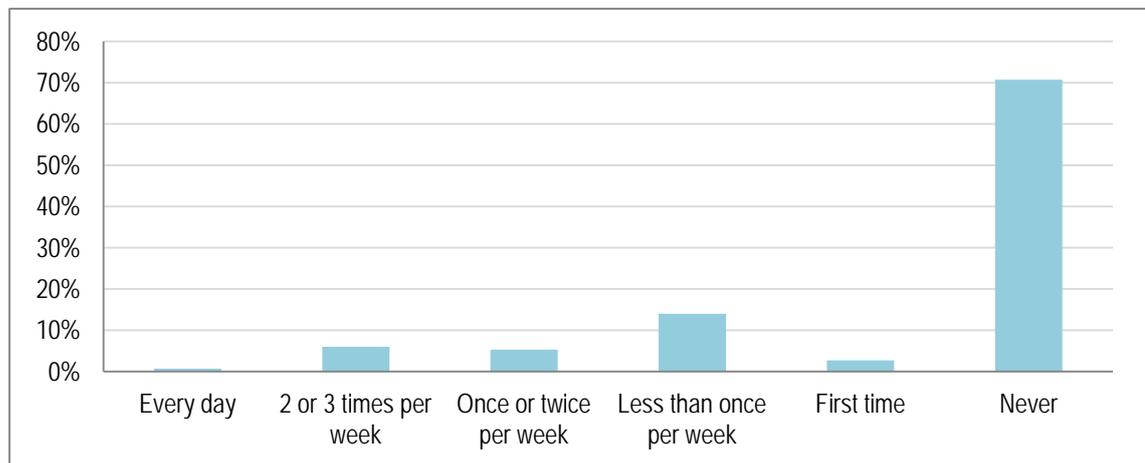


*FIGURE 14: USAGE OF LEISURE OFFER*

3.11.1 There are not many leisure facilities (e.g. cinema, 10 pin bowling, swimming pools etc.) at Victoria. The usage is low, with 71 % stating they never use them. 14 % use them less than once per week, 5 % use them once or twice per week, 6 % two or three times per week and only 1 consumer said they use them every day (this is likely to be the Queen Mother Sports Centre which is outside but near the area or one of the private gyms). There is slightly higher usage for local residents compared to non-residents but even so, 51 % of local residents state they never use the leisure facilities in Victoria.

# 3. Consumer Survey

*3.12 How often do you visit or use night time facilities in Victoria?*
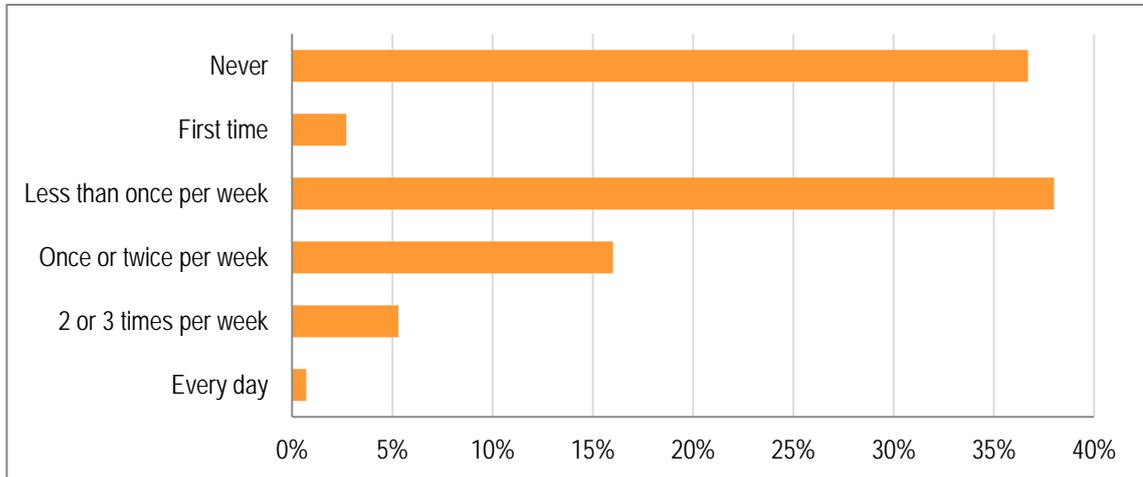


*FIGURE 15: USAGE OF NIGHT TIME OFFER*

3.12.1 Use of the night time facilities (i.e. bars, pubs, restaurants, nightclubs etc) is considerably higher than the leisure facilities. Although 37 % of those questioned stated that they never use them, 22 % responded that they use them at least once per week (the majority of which use them once or twice per week) and a further 38 % that they use them less than once per week.

3.12.2 Again use of night-time facilities is slightly higher for local residents than non-residents.

*3.13 Overall, which phrase on the card represents best how satisfied you are with Victoria as a local place to shop and visit?*
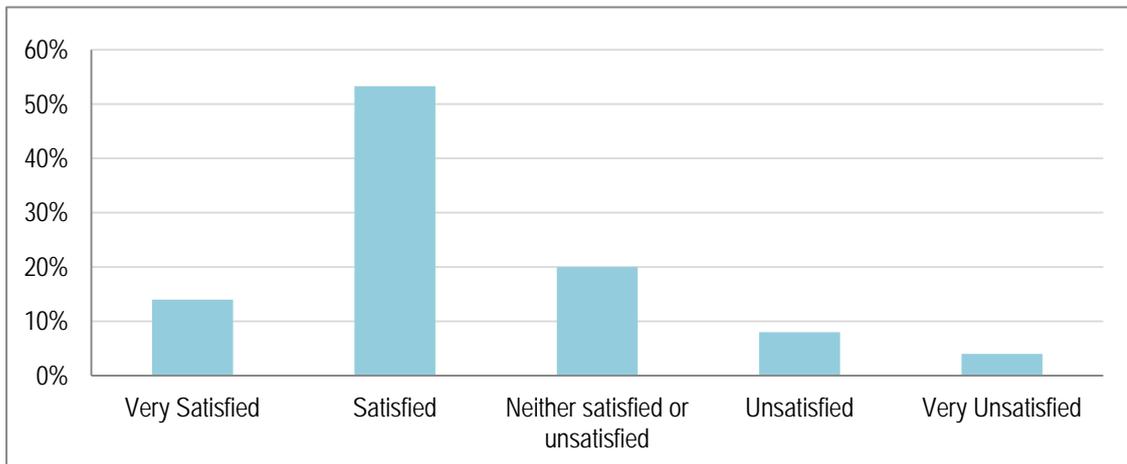


*FIGURE 16: OVERALL CONSUMER SATISFACTION LEVELS*

3.13.1 Generally consumers were satisfied with Victoria as a local place to shop and visit; 53 % said that they were satisfied and a further 14 % that they were very satisfied. 20 % said they were neither satisfied nor unsatisfied, while 8 % of consumers said they were unsatisfied and 4 % very unsatisfied. This again may be a reflection of the amount of construction work underway in the area, rather than a reflection of the active retail function of Victoria.

# 4.  Trader Survey

An independent survey of 100 traders in the Victoria Shopping Centre was carried out on Friday 26 April 2013 and 50 respondents took part in the study. Of this sample, 40 % were international retailers, 30 % were national operators and 30 % independent retailers.

*4.1    How long has your business been located in the Victoria area?*
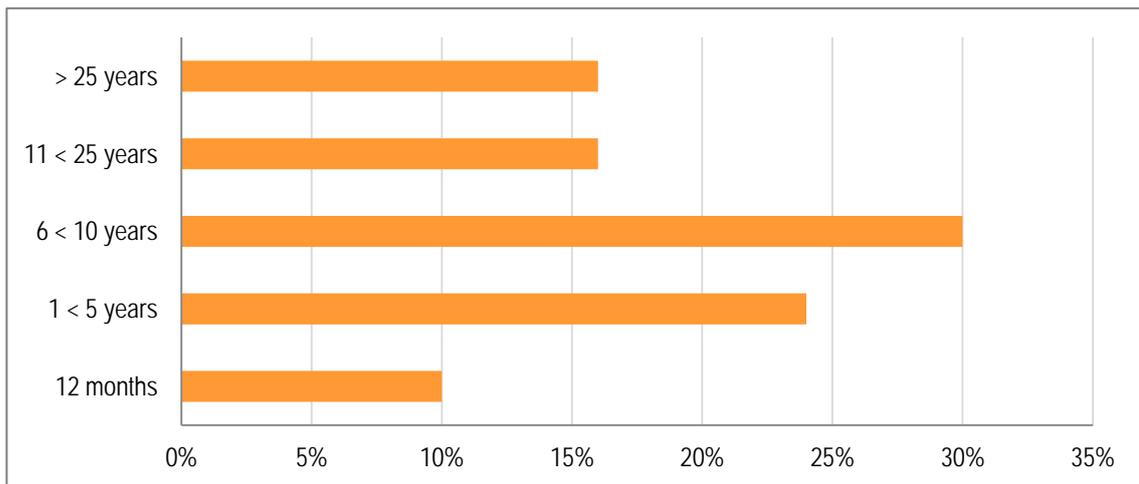


*FIGURE 17: LENGTH OF TIME TRADED*

4.1.1   There are a good number of operators who have been trading in the Victoria area for the long term, with 16 % having traded for over 25 years in the area and a further 16 % for between 11 and 25 years. 30 % have traded in the area for between 6 and 10 years and 24 % 1 to 5 years. The offer is kept fresh with 10 % of newcomers, having traded here for 1 year or less.

*4.2    Do you have any plans to change your business over the next 12 months?*
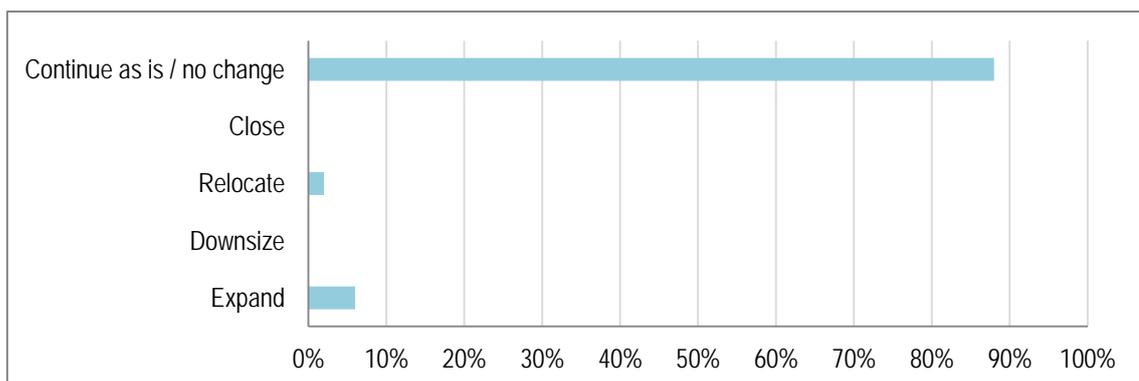


*FIGURE 18: RETAILER FUTURE PLANS*

4.2.1   Trading is very stable and positive at Victoria with 88 % of respondents planning to continue trading as they are with no change to their business over the next year. 6 % were planning to expand and 2 % were planning to relocate. No operators said they were planning to downsize or close.

# 4.  Trader Survey

*4.3    Please rate the Victoria area in relation to the following factors*
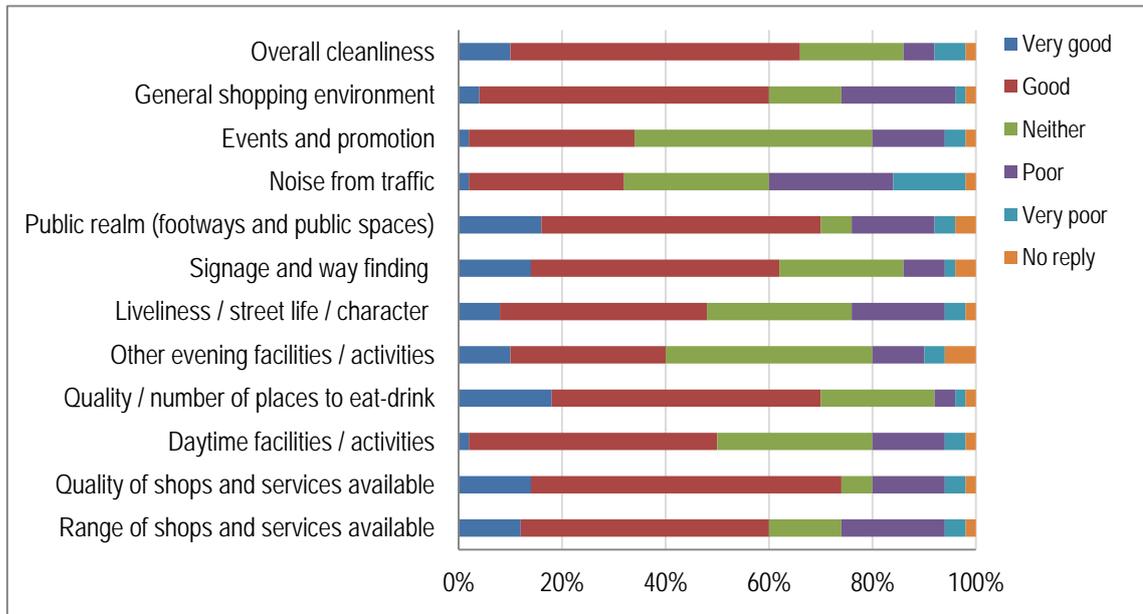


*FIGURE 19: TRADER LOCATION ATTRIBUTE SETTINGS*

4.3.1   Victoria was well rated across most areas by local operators. The most favourably rated areas were the range and quality of shops, services and places to eat and drink, public realm, overall cleanliness and signage / way finding, with over 60 % of businesses rating these as good or very good.

4.3.2   The least well rated area was noise from traffic, with 38 % rating this poor or very poor.

*4.4    If you have rated any factors as poor or very poor, what do you think should be changed?*

4.4.1   Those that rated some areas poor or very poor suggested the following improvements; improve pavements and roads, improve the Market (although they did not make clear whether they meant the nearby Strutton Ground Street market, Cardinal Place Thursday market, street trading pitches or market provision more generally), more police / safety, better mix of shops and restaurants and lower rents / rates.

# 4. Trader Survey

*4.5* *Have you noticed any improvements to the general environment in Victoria in the last 12*



Yes ■
No ■
Don't know ■
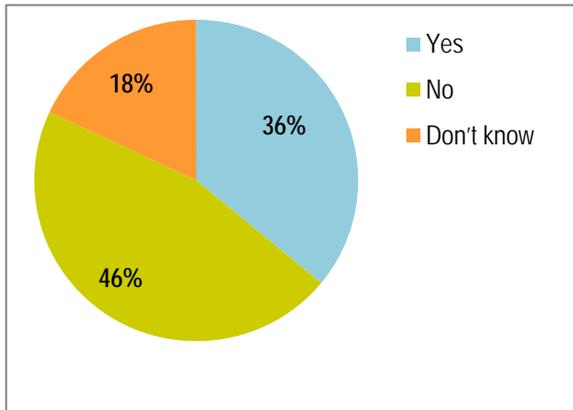
*months?*

*FIGURE 20: OBSERVATION OF ENVIRONMENT CHANGES*

4.5.1 36 % of operators had noticed improvements to the general environment of Victoria in the last year, considerably more than in any of the other centres surveyed. However 46 % had not noticed any improvements, while 18 % were not sure if they had noticed any improvements or not. Improvements that were noticed included improvements to the pavements, roads and lighting, more variety of brands, cleaner, more advertising, better police presence and better atmosphere.

*4.6* *What three further improvements would you like to see made to this retail centre?*
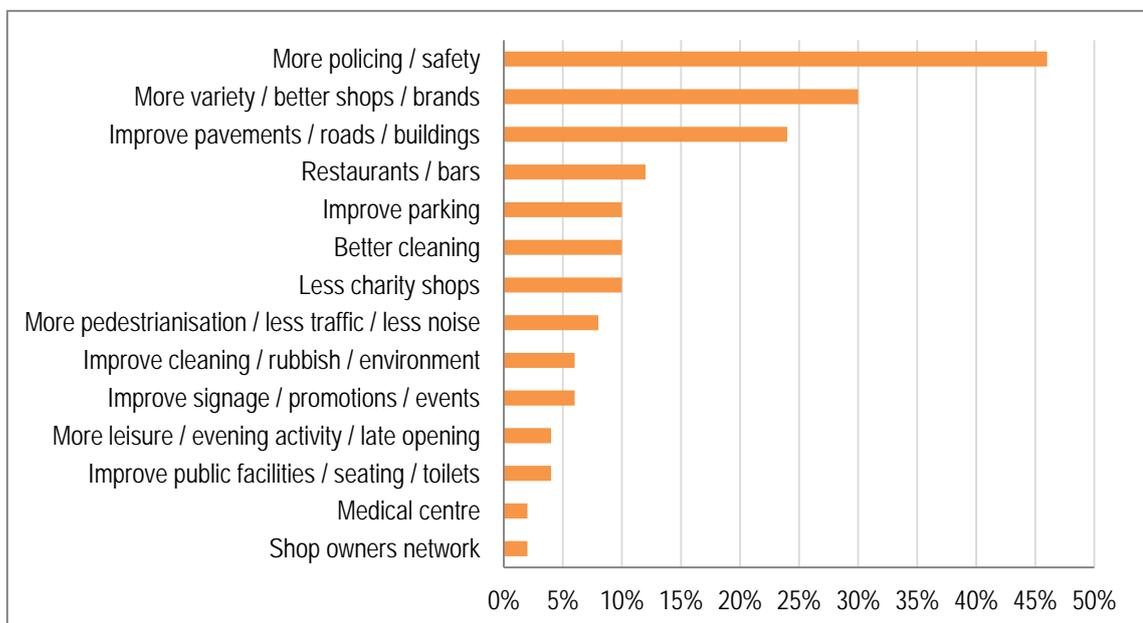


*FIGURE 21: FURTHER IMPROVEMENTS WANTED BY TRADERS*

4.6.1 The most important improvement wanted in the area by local businesses was more policing / safety, with 46 % concerned about this. Improvements to the retail offer (30 %) and pavements / roads / buildings (24 %) were all listed as being important factors for local businesses too.

19

# 4.  Trader Survey

*4.7    Please rate the Victoria area in relation to the following issues or factors*
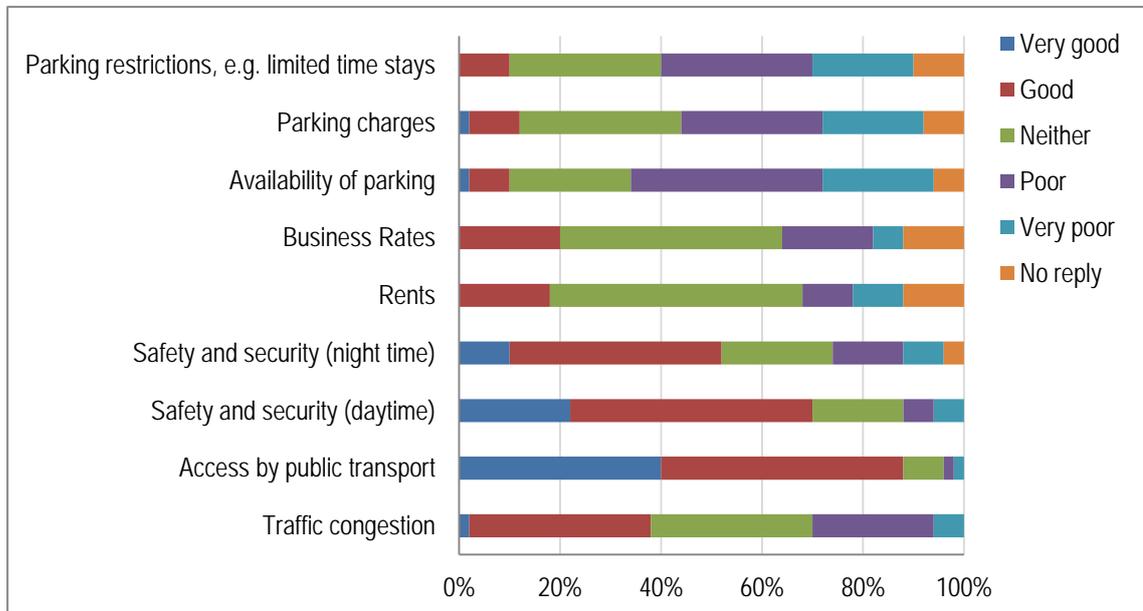


*FIGURE 22: FURTHER TRADER LOCATION ATTRIBUTE RATING*

4.7.1    The most positively rated area of Victoria was access by public transport, with 40 % rating this very good and a further 48 % rating it good. Despite more policing / safety being the area operators most wanted to see improved, daytime security also scored well, with 22 % rating it as very good and a further 48 % rating it good. Night time safety and security rated slightly lower, however 10 % still rated it very good, with a further 42 % rating it good.

4.7.2    Parking was the most poorly rated area amongst local business occupiers, with availability of parking being rated poor or very poor by 60 %, parking restrictions rated poor or very poor by 50 % and parking charges rated poor or very poor by 48 %.  Parking is often rated poorly by traders.  Consumers however, mostly arrive into Victoria by public transport, by bus/coach, or on foot, and so parking is less of an issue for them and is unlikely to be impacting *significantly* on trading patterns in Victoria.

# 4. Trader Survey

*4.8* *Over the next 12 months do you expect your business performance to improve, stay the same or decline?*
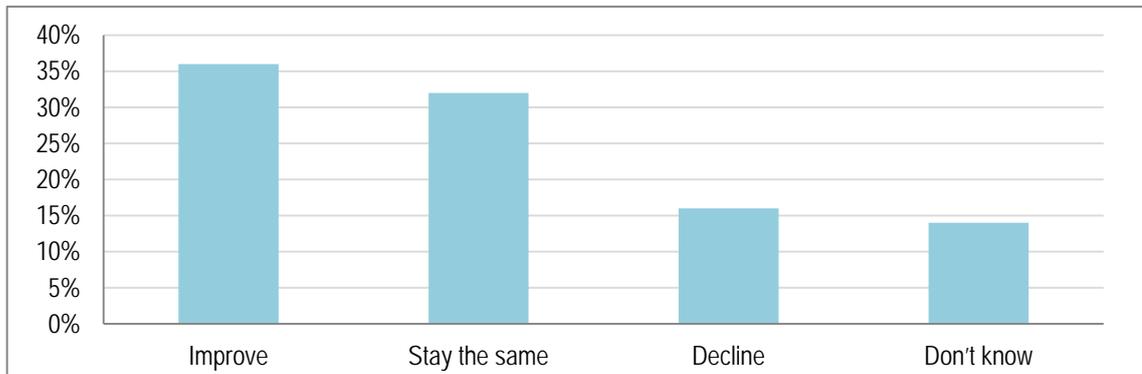


*FIGURE 23: FUTURE TRADE EXPECTATIONS*

4.8.1 Business projections for the next year were positive (compared to the other centres surveyed), with 36 % of businesses expecting their trading performance to improve and 32 % expecting it to stay the same. Only 16 % expected their trading performance to decline over the next 12 months, and 14 % stated that they were unsure how, if at all, their trading performance would change. 2 % did not reply to this question.

4.8.2 Those forecasting a decline attributed this to low footfall, rents / rates being too high, supermarkets / competition and not being allowed to expand.

*4.9* *To what extent would you agree with the following statements?*
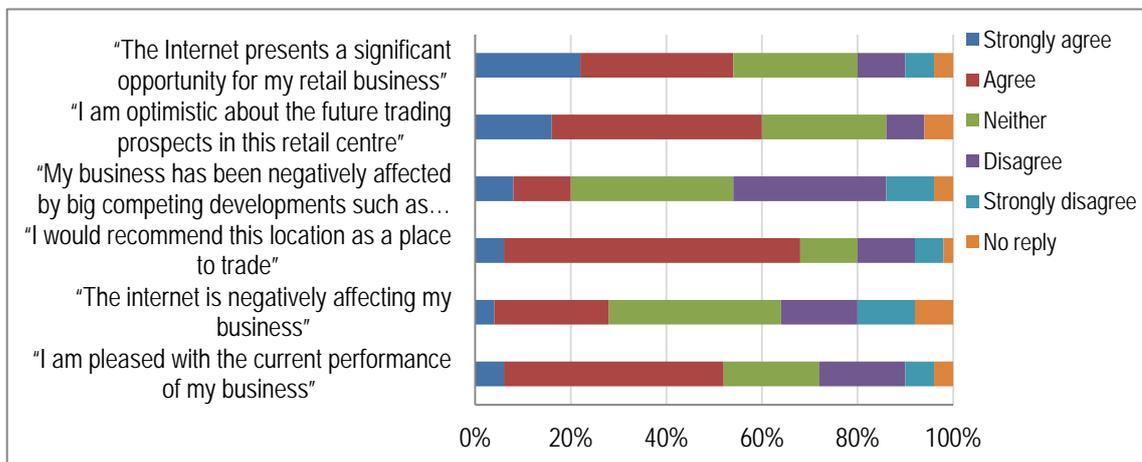


*FIGURE 24: TRADER RATING STATEMENTS*

4.9.1 Overall, views on trading at Victoria were positive; 68 % agreed or strongly agreed that they would recommend this location as a place to trade; 60 % agreed or strongly agreed that they were optimistic about the future trading prospects in this retail centre and 52 % agreed or strongly agreed that they were pleased with the current performance of their business.

4.9.2 54 % of operators felt the internet presents a significant opportunity for retail business although equal numbers of operators agreed and disagreed that the internet is negatively affecting business (28 % each agreeing and disagreeing, 36 % neither and 8 % no reply).

4.9.3 Big competing centres such as Westfield were not seen as a threat for 42 % of businesses and only 20 % did feel the threat, while 34 % neither agreed nor disagreed and 4 % did not answer.

# 4.  Trader Survey

*4.10  Please indicate how your business is trading year on year*
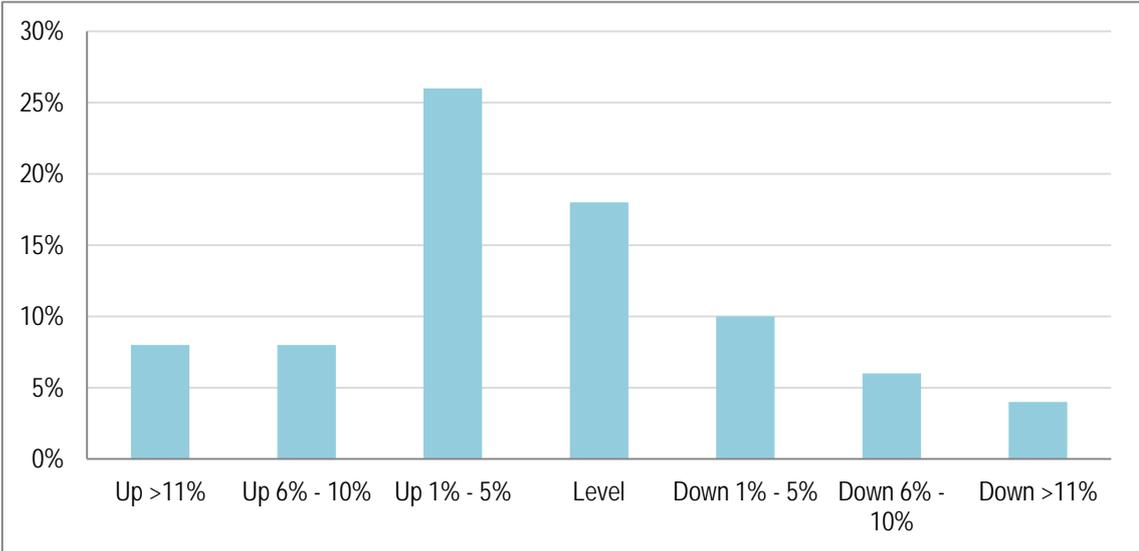


*FIGURE 25: RECENT BUSINESS PERFORMANCE*

4.10.1 Trading performance was recorded as being very positive compared to last year, with 42 % of traders responding that their trading performance was up from last year (particularly F&B operators), 18 % responding that it was level, i.e. the same as last year, and 20 % responding that it had gone down since last year, representing the joint highest overall improvement of the centres surveyed, along with Baker Street (South). The majority of those trading up were doing so by between 1 % and 5 %, while half of those trading down were doing so by 1 % to 5 %. 20 % declined to answer this question.

*4.11  Finally, is there anything else you think is needed at or missing from this retail centre?*

4.11.1 Additional issues that the local business occupiers wanted addressed included: improving public seating / spaces / signs (as mentioned by 11 operators), a better mix of shops / fewer charity shops (as mentioned by 11 businesses), improved roads / pavements (mentioned by 7), more policing / safety / less homeless (4), better restaurants / cafes / pubs (4), specific shops (3), building works to finish (3), improved cleaning (1), improve the variety of the Market / Market area (1), pedestrianising the area / less traffic (1), control licensing laws (1), late openings / Sunday trading (1) and an NHS centre (mentioned 1 operator).  The previous NHS centre on Buckingham Gate closed approximately 2 years ago.

# 5. Location Review

**Physical / Environmental Audit**

5.1    Victoria's retail offer is primarily located on Victoria Street itself, as well as the station concourse, Victoria Place and Colonnade Walk. The centre is very busy; almost 24 hours as a result of the transport interchange system associated with the train, Underground, bus and coach stations. The area is also a very busy commercial centre, with a significant local workforce, as well as providing a significant arrival / departure point for many tourists and day visitors arriving in London.

5.2    For ease of reference, the centre audit has been split into five zones, as per the following map.
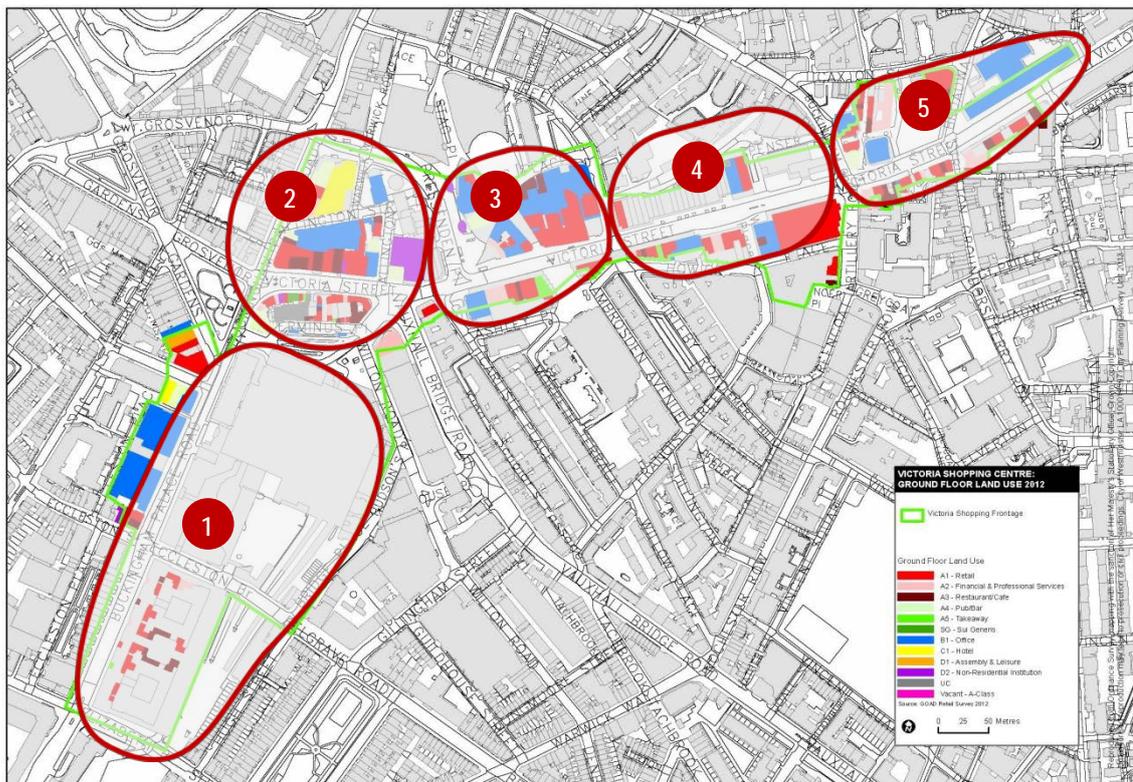


*FIGURE 26: BREAKDOWN OF ZONES WITHIN VICTORIA STREET SHOPPING CENTRE*

**Zone 1 – Victoria Station and Colonnade Walk**

5.3    This zone is dominated by the very busy Victoria Train and Underground station. It is one of the busiest in London.  70 million rail passengers passed through Victoria in 2010.  The station's 195 million total passenger movements per year (tube, rail and passing trade) are set to increase by over 30 % during the weekday morning peaks in coming years.

# 5.  Location Review

5.4   The station concourse contains a strong travel oriented offer, i.e. minor comparison top-up goods, convenience, service and F&B operators. With traditional brands such as Boots, WHSmith, M&S, Monsoon, Weatherspoons, Burger King and McDonald's, the offer is easy to see, easy to understand and easy to use. The consumer environment is very good, well maintained and spotlessly clean.



*FIGURE 27*          *FIGURE 28*          *FIGURE 29*          *FIGURE 30*

5.5   At the rear of the concourse at first floor level is Victoria Place Shopping Centre. This covered scheme was the subject of refurbishment and minor extension at the time of the review, with several retail units either closed awaiting refurbishment, or indeed under active refurbishment. The offer is more comparison dominated with trading units from Ann Summers, Next and New Look to Dorothy Perkins. There is also a strong minor comparison / travel related service offer, including two mobile phone shops, opticians, stationers, toiletries and mall units selling mobile phone accessories. The F&B offer is good, with units such as KFC, Cafe Rouge and McDonald's trading around an eighties style food court. The convenience offer is anchored by a Sainsbury's "Central" type store, i.e. large, but small format food only store. Whilst the offer within this centre is "work in progress" it looks set to remain a



busy and popular cut-through retail facility, linking the Coach Station to the mainline station and Victoria Street.

*FIGURE 31*          *FIGURE 32*          *FIGURE 33*          *FIGURE 34*

5.6   The final element of the retail offer in this zone is Colonnade Walk. This small covered cut through is formed underneath a substantial office block and links Victoria Place to Victoria Coach Station.  The offer is small scale; shops are typically very small and mostly service and convenience oriented. There are a number of cafe F&B offers. The environment is pleasant enough, clean and well maintained, however the offer is not strong enough to attract footfall in its own right.



*FIGURE 35*          *FIGURE 36*          *FIGURE 37*          *FIGURE 38*

5.7   In January 2012 a planning application was submitted to the Council in relation to this site (123 Buckingham Palace Road) for construction of new shop fronts in association with the reconfiguration of the existing retail units to provide 12 retail units, comprising A1 uses (including a supermarket) and A3 uses (App Ref 12/00853/FULL).

# 5.  Location Review

## Zone 2 – Area to the front of Victoria Station

5.8     At the time of the review, much of the area in front of Victoria Station was under development; either as a result of the Victoria Underground Station upgrade, or Land Securities' Victoria Circle mixed use development to the north on Victoria Street.  The works are expected to continue for some time (the new London Underground ticket hall is expected to open in 2016). However, the bus station is expected to remain in operation during that period.

5.9     The Nova development involved the demolition of all existing building stock on the parcel of land surrounded by Bressenden Place, Victoria Street and Buckingham Palace Road. The development will total circa 67,500 sqm. of new floorspace, of which 45,600 sqm. will be office stock, 7,400 sqm. of retail / F&B space and 170 luxury flats. Completion of this scheme is also expected in 2016.

## Zone 3 – Cardinal Place / Victoria Street

5.10    This zone is dominated by the architecturally impressive and imposing Cardinal Place development, which opened in 2005. This modern mixed use development contains 11 floors of office and a retail / F&B covered scheme at ground floor level. The offer is dominated by a mid-sized M&S store (food-hall and limited edition fashion range), along with other mid-market fashion and accessory retailers such as Hobbs, Jones, Monsoon, Hawes and Curtis, Topshop and Zara. The offer is further complemented by other specialist comparison goods retailers such as L'Occitane, Space NK, The North Face and Runners Need. The service offer is good (bank, opticians and florist), as is the extensive F&B offer,



including Browns, La Tasca, Zizzi, Eat, Costa and Wagamama.

*FIGURE 39*          *FIGURE 40*              *FIGURE 41*              *FIGURE 42*

5.11    Although occasionally windy, the environment is covered, well maintained and spotlessly clean.  It is a very pleasant shopping environment, with a strong retail line-up and it appears popular with the many office workers in the area.

5.12    The block opposite Cardinal Place on the south side of Victoria Street also offers shoppers an established service dominated offer, supported with comparison and catering. The line-up includes Currys / PC World, Moss, Itsu, NatWest and McDonald's. Whilst the shopping environment was dark at the time of the survey, due to the overhang of the building above, it is an incredibly busy footfall route to / from Victoria Station (busiest individual location out of circa 60 locations surveyed for the wider study).



*FIGURE 43*                  *FIGURE 44*

# 5. Location Review

**Zone 4 – Victoria Street from Palace Street to Buckingham Gate**

5.13 This zone is anchored by the House of Fraser Department Store at the junction of Victoria Street and Artillery Row.

5.14 This circa 11,000 sqm. store (estimate), spread over 4 trading floors, offers a full line department store offer, including fashion clothing, accessories, footwear, jewellery, toiletries, luggage, kitchenware and bedding. The store also offers a 'click and collect' service, bureau de change, restaurant and cafe, florist and a travel agent.

5.15 The offer is modern, appealing and a useful anchor for the shopping centre.



*FIGURE 45*



*FIGURE 46*

**Zone 5 – Victoria Street, Buckingham Gate to Perkin's Rents**

5.16 The retail offer in the remaining area of the shopping centre is more or less totally contained on the south side of the road (with the exception of The Albert public house). The rest of the offer on the north side of the road is either office space (Windsor House and New Scotland Yard) or a small green square (Christchurch Gardens).

5.17 The northern side of this section of the street (with the exception of City Hall) was, at the time of survey, either under construction or nearing completion. As such, there was little active retail in this stretch of the road, other than the very new Little Waitrose Foodstore, which opened in June 2013 (See Figure 47).



*FIGURE 47*



*FIGURE 48*

# 5.   Location Review

5.18   On the other side of the road, the units appear to be brand new, with full refurbishment works completed at 123 Victoria Street within the last 18 months. The units are F&B / service dominated, including a double fronted Prêt a Manger, Wasabi (sushi), Starbucks and an independent cafe. The service offer includes two banks, one bureau de change, opticians, a pawnbrokers and a phone shop. Clarks shoes offers the only comparison goods offer in this parade of shops.


*FIGURE 49*


*FIGURE 50*

5.19   The environment in this part of Victoria is very consumer friendly, with wide and clean pavements, lots of places to sit and good sightlines.

5.20   The offer on the south side of the road contains a broadly equal split of F&B and service operators, mostly in smallish units. The F&B offer is represented by Pizza Express, Prêt a Manger and an independent Italian restaurant and cafe.

5.21   The service offer contains two banks, bureau de change, photo developing, beauty treatments, hairdresser, pawnbrokers, mailboxes and a shoe repairs / key cutting service.

5.22   Strutton Ground Market can be found off Victoria Street at this point, although the market is not included within the shopping centre survey as it is covered by a separate Local Shopping Centre policy designation.  A separate Health Check survey will be undertaken in Strutton Ground in 2013.


*FIGURE 51*


*FIGURE 52*


*FIGURE 53*


*FIGURE 54*

5.23   The retail offer is well maintained, the street is tidy and free from litter and sightlines are excellent. It is a pleasant retail environment, clearly targeting the many office workers in the area.

# 5.  Location Review

**Night Time Economy**

5.24    Victoria's night-time economy is performing very well and appears in very good health.

5.25    The offer is anchored by the F&B offer in Cardinal Place, which is well managed and delivered and serves the local workforce, as well as theatre goers. Most of the restaurants have external tables and chairs and appear to attract very little in the way of anti-social behaviour.

5.26    The area contains several traditional pubs, acting as local landmarks.



*FIGURE 55*



*FIGURE 56*

5.27    The station itself contains a number of F&B facilities open later into the evening, and these are dominated by very well known fast food brands.

5.28    The area outside the station on Wilton Road and Terminus Place is not especially pleasant, especially in the evening, due to excessive street litter and cigarette butts being discarded on the street, although this is a common problem outside major transport interchanges, and the ongoing Station Upgrade works.

5.29    Victoria Street feels safe at night, as a result of it being well lit and busy, with clear sightlines on the whole and several visible crossing points.

# 5.  Location Review

**Rents & Yields**

5.30  The following table and graph list some of the published rents achieved in Victoria since the last Health Check was undertaken, according to the Co-Star Focus commercial property database.

*TABLE 3: VICTORIA PUBLISHED RENTS ACHIEVED*

| Street  No. | Street | Event Date | Size SqM | Achieved Rent (£ per sqm. per annum) |
|---|---|---|---|---|
| 181 - 183 | Victoria Street | 25/03/2009 | 54 | 820.86 |
| 123 - 151 | Buckingham Palace Road | 01/09/2009 | 93 | 768.87 |
| 193 | Victoria Street | 18/03/2010 | 49 | 617.42 |
| 123 - 151 | Buckingham Palace Road | 06/07/2010 | 131 | 160.17 |
| 26 - 30 | Buckingham Palace Road | 19/07/2010 | 98 | 373.19 |
| 49 - 75 | Buckingham Palace Road | 15/04/2011 | 157 | 637.66 |
| 199 | Victoria Street | 24/04/2012 | 63 | 896.96 |
| 191 | Victoria Street | 01/05/2012 | 41 | 1,078.88 |
| 111-115 | Buckingham Palace Road | 04/05/2012 | 83 | 399.13 |
| 26 - 30 | Buckingham Palace Road | 01/09/2012 | 102 | 356.18 |
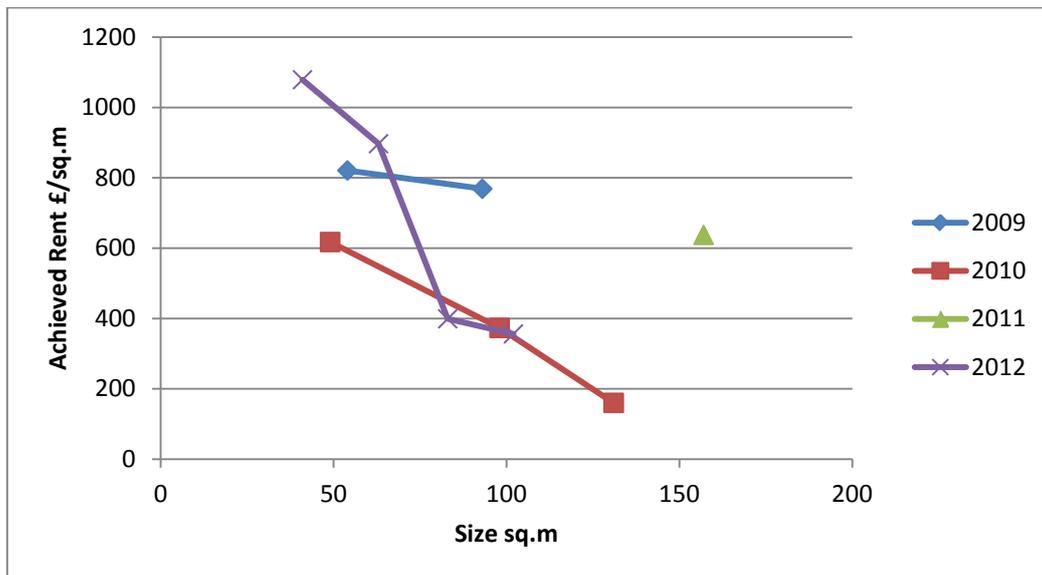


*FIGURE 57: RENTS ACHIEVED BY YEAR*

5.31  As can be seen, the smaller units tended to attract the highest rents per sqm., especially those located on Victoria Street and these appear to have risen in 2012. On the whole there are an insufficient number of records to ascertain a robust trend line.  Whilst there were a number of additional deals quoted on the database, they did not have achieved rents published.

# 5. Location Review

5.33 The following table lists the published yields achieved on property transactions in the area since the last Heath Check was undertaken.

*TABLE 4: VICTORIA PUBLISHED YIELDS ACHIEVED*

| Street No. | Street | Event Date | Sale Price | Yield Achieved (%) |
|---|---|---|---|---|
| 160 | Victoria Street | 14/01/2008 | 4,900,000 | 3.5 |
| 50 | Victoria Street | 23/10/2009 | 116,000,000 | 5.75 |
| 12 - 16 | Buckingham Palace Road | 16/08/2011 | 4,750,000 | 6.34 |

5.34 As can be seen, there are a limited number of deals published with yields achieved. Of those that are, the trend is upwards.

## Crime Data

5.35 The following table provides a summary of recorded crime in the Victoria Shopping Centre, using the latest information from the Police CRIS database.

*TABLE 5: VICTORIA SHOPPING CENTRE RECORDED CRIME DATA*

| Crime Type | 2010/11 | 2011/12 | 2012/13 | 10/11 vs. 11/12 | 11/12 vs. 12/13 |
|---|---|---|---|---|---|
| Burglary | 17 | 25 | 16 | 8 | -9 |
| Criminal Damage | 36 | 30 | 20 | -6 | -10 |
| Drugs | 52 | 53 | 49 | 1 | -4 |
| Fraud or Forgery | 23 | 36 | 44 | 13 | 8 |
| Other Accepted Crime | 79 | 87 | 85 | 8 | -2 |
| Robbery | 8 | 14 | 10 | 6 | -4 |
| Sexual Offences | 9 | 6 | 6 | -3 | 0 |
| Theft and Handling | 720 | 777 | 787 | 57 | 10 |
| ABH / Assaults | 99 | 90 | 69 | -9 | -21 |
| **Grand Total** | **1043** | **1118** | **1086** | **75** | **-32** |

5.36 As can be seen, Victoria follows a very similar pattern to the majority of other locations in the programme, namely dominated by Theft and Handling and Violence Against the Person, with a big jump from 2010/11 to 2011/12 and then a slight drop in 2012/2013.

5.37 Unsurprisingly, given it is the second biggest centre surveyed as part of this Health Check programme, covering a wide geographical area and with the highest day-time pedestrian flows of all centres surveyed, crime levels in Victoria were the highest out of all locations surveyed. This is true both absolutely as well as relatively, i.e. Victoria attracts more crimes overall than the biggest centre surveyed (Queensway) despite having approximately half of its floorspace, it does attract almost twice the number of pedestrians.

# 5. Location Review

**Summary**

5.38    The following table summarises the Health and Vitality of the Victoria Shopping Centre.   Higher scores equal more positive results.

*TABLE 6: HEALTH & VITALITY SCORE*

| Health & Vitality Measure | Summary Rating (out of 5) |
|---|---|
| Evidence of refurbishment & extensions | 5 |
| Retail churn / recent new openings | 4 |
| Visibly long term vacant retail units | 4 |
| Long term undeveloped plots | 5 |
| Quality of public realm | 3 |
| Quality of retail environment | 4 |
| Visible street drinking / beggars | 5 |
| Thriving night time economy | 5 |
| Litter & cleanliness | 4 |
| Signage and wayfinding | 4 |
| Thriving permanent street market | n/a |
| **Total Score** | **43 out of 50 (86%)** |

5.39    Overall, we would summarise from the Location Review that Victoria Shopping Centre is in very good health with a very positive prognosis for the future.

5.40    For its size, Victoria punches above its weight. It has a number of strong anchors, including Cardinal Place, House of Fraser department store and of course, Victoria Train and Underground station.

5.41    There is a strong comparison goods line up, and excellent F&B offer and extensive service goods offer. The convenience offer is perhaps the only area which could be improved, notwithstanding the recent addition                                    of                                    a Little Waitrose on Victoria Street.  The wider area has a high residential population and their needs must not be overlooked.

5.42    The offer is closely aligned to the needs of the many office workers in the area, of which there are set to be many more. Much of the area is under active redevelopment, which will bring new retail and F&B facilities to the area.

5.43    The centre presents a positive shopping environment and retail experience with wide pavements, tidy and litter free streetscape (apart from immediately outside the entrance to the train station) and lots of seating for pedestrians.  Whilst it scores a 3 currently for public realm, this will rise to 5 as the various regeneration projects are completed, hence Victoria will score 90 % on the Health and Vitality measures rated above.

5.44    There is much evidence of growth and regeneration and very little sign of decline or malaise.

# 6.   Footfall

6.1   Footfall data was collected at seven locations in Victoria, as indicated on figure 57 below. Counts were taken for five minutes during each hour at each location, both from left to right and right to left. These were conducted in rotation across the trading day, varying times at each location, between 10am and 7pm, on both weekdays and a Saturday during May and June 2013. Count Point 7 was added for the early evening only survey on 11 June (17.00 to 19.00) due to the disruption caused by the construction works at point 4, i.e. normal main entrance to Cardinal Place.



1 Entrance to Victoria Place
2 Past Prêt a Manger, Terminus Place
3 Past Vodafone, Victoria Street
4 In / Out Cardinal Place (front)
5 Passing House of Fraser, Victoria Street
6 In / Out Strutton Ground Market
7 In / Cardinal Place (by Swarovski)
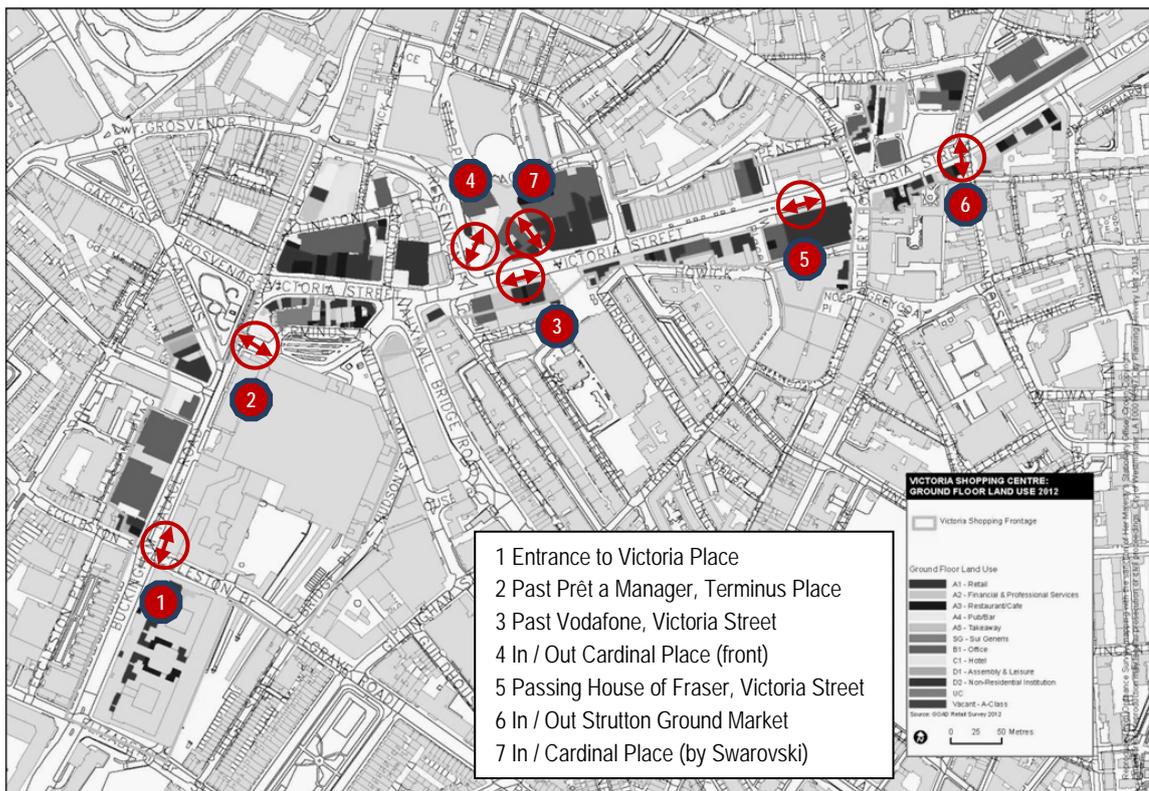
*FIGURE 58: VICTORIA HEALTH CHECK COUNT POINT LOCATIONS*

6.2   Count point 3, Victoria Street, outside Vodafone had the highest levels of footfall of all of the count points recorded. This is the 100 % point and the other locations have been indexed against it, as shown in figure 58 overleaf.

# 6. Footfall



1 Entrance to Victoria Place
2 Past Prêt a Manger, Terminus Place
3 Past Vodafone, Victoria Street
4 In / Out Cardinal Place (by nose)
5 Passing House of Fraser, Victoria Street
6 In / Out Strutton Ground Market
7 In / Cardinal Place (by Swarovski)
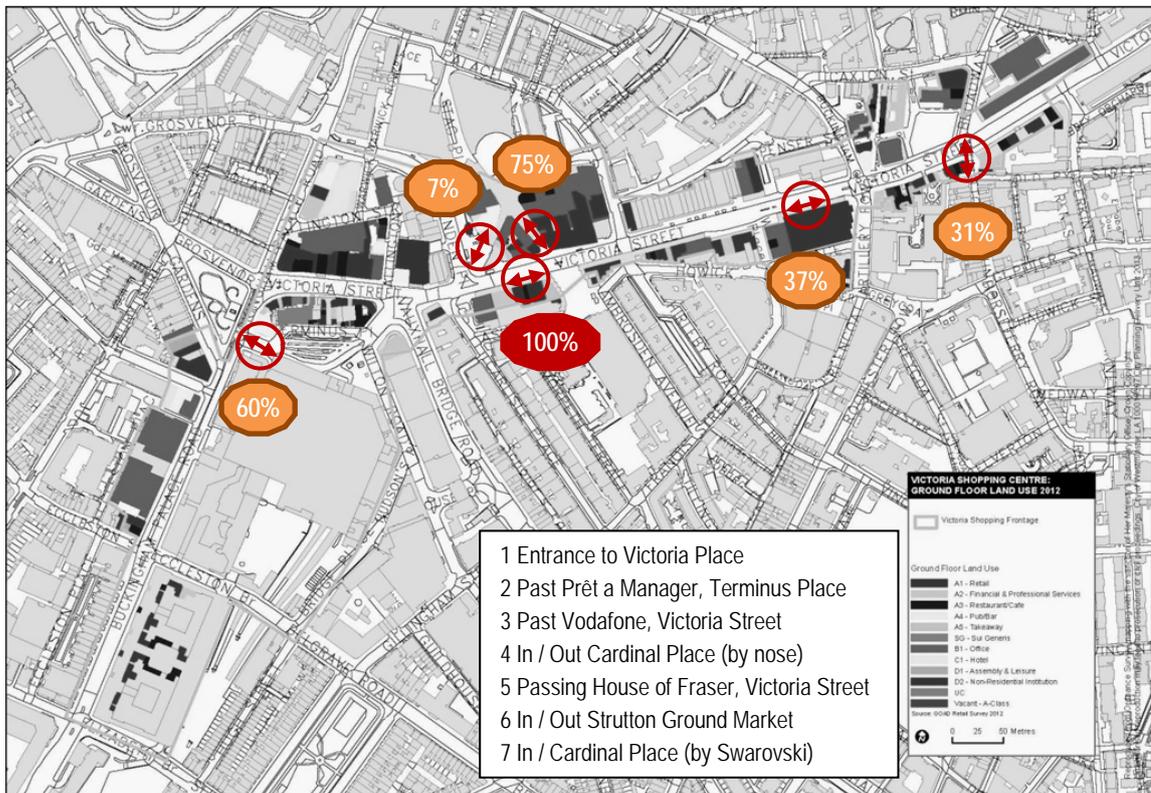
*FIGURE 59: FOOTFALL INDEX*

6.3    Point 3, past Vodafone on Victoria Street attracts circa 4,900 people passing per hour on average.

6.4    The second busiest location is at the entrance to Cardinal Place (by Swarovski), reaching 75 % footfall of the peak location, on average circa 3,600 people per hour.

6.5    Terminus Place and the entrance to Victoria Place reached 60 % and 51 % respectively (on average circa 3,000 and 2,500 people per hour respectively).

6.6    Strutton Ground and Victoria Street (at House of Fraser), were quieter with 37 % and 31 % (on average circa 1,800 and 1,500 people per hour respectively).

6.7    The quietest location by far was the entrance to Cardinal Place at the 'nose' (by the junction of Victoria Street and Bressenden Place), reaching only 7 % of the peak footfall, circa 350 people passing per hour on average, however there were major construction works underway at the time of the survey, with no direct access across Victoria Street at this point. Ordinarily this would be one of the busiest footfall routes in the area.

# 6.  Footfall
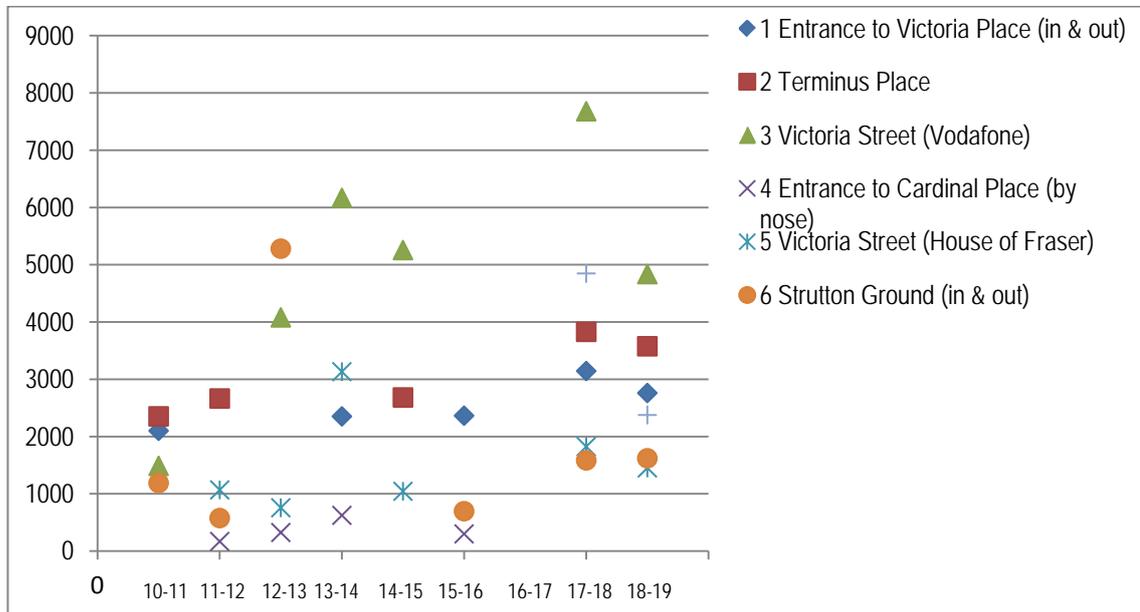


FIGURE 60: DAILY FOOTFALL COUNTS

6.8     The graph shows that Victoria's footfall tends to be busiest in the evening, particularly between 5pm and 6pm and at lunchtime, from 1pm to 2pm, reflecting the importance and influence of the footfall of local workers, travelling in the evening and using the shops and eateries during their lunch break. Point 3 outside Vodafone is typically the busiest location during the day. Strutton Ground is also very busy at lunchtimes, reflecting the hot / takeaway food available in the market and shops.

6.9     The morning peak time was not surveyed, but is anticipated to match the evening peak, albeit with the majority of pedestrians travelling in the opposite direction.

# 6. Footfall
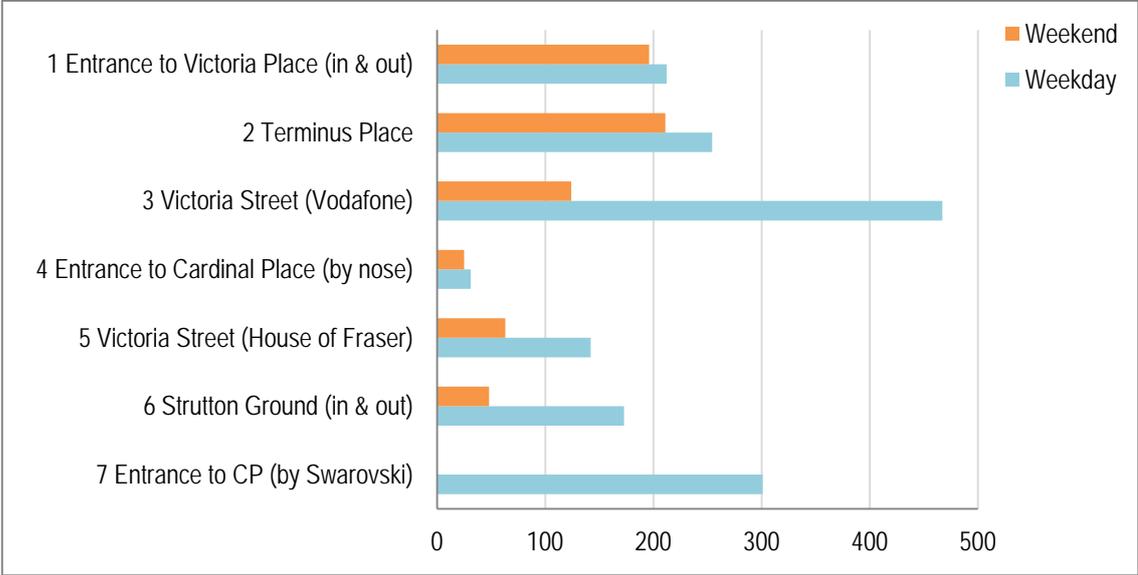


*FIGURE 61: WEEKDAY AND WEEKEND AVERAGE FOOTFALL*

6.10 All locations attracted significantly higher footfall during the week compared to the weekend, reflecting the high office worker population in the area. The difference was most notable on Victoria Street, particularly at point 3, outside Vodafone and Strutton Ground.

6.11 At Victoria Place and Terminus Place the difference was less marked, probably as a result of the high tourist population at the weekend using Victoria Station to access the West End.

# 7. Bus Usage and Cycle Hire

7.1    Westminster City Council commissioned a survey of bus users, alighting and departing at the bus stop shown on the following map (figure 62)
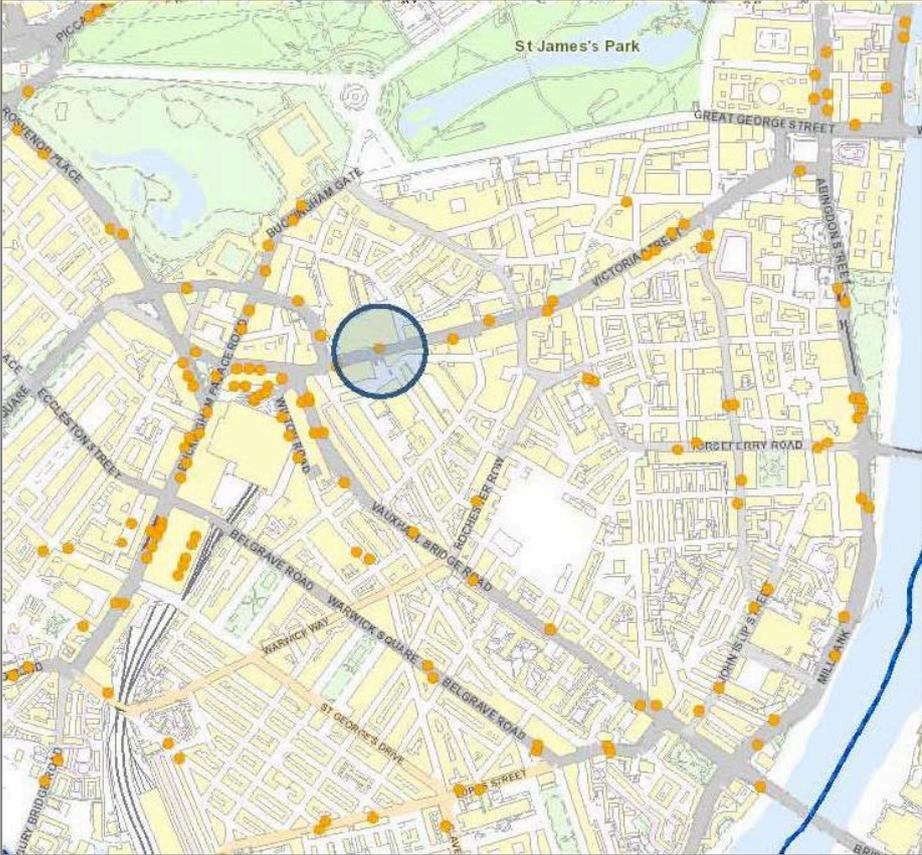


*FIGURE 62: LOCATION OF BUS SURVEY*

# 7. Bus Usage and Cycle Hire

7.2    The bus survey was undertaken between the times of 12-2pm and again between 7-9pm on the 14<sup>th</sup> of March 2013.

7.3    Four bus routes were picked up in the survey using this stop, including route 11 (Fulham – Liverpool Street), route 24 (Hampstead Heath – Pimlico), route 148 (Camberwell – White City) and route 211 (Hammersmith – Waterloo).
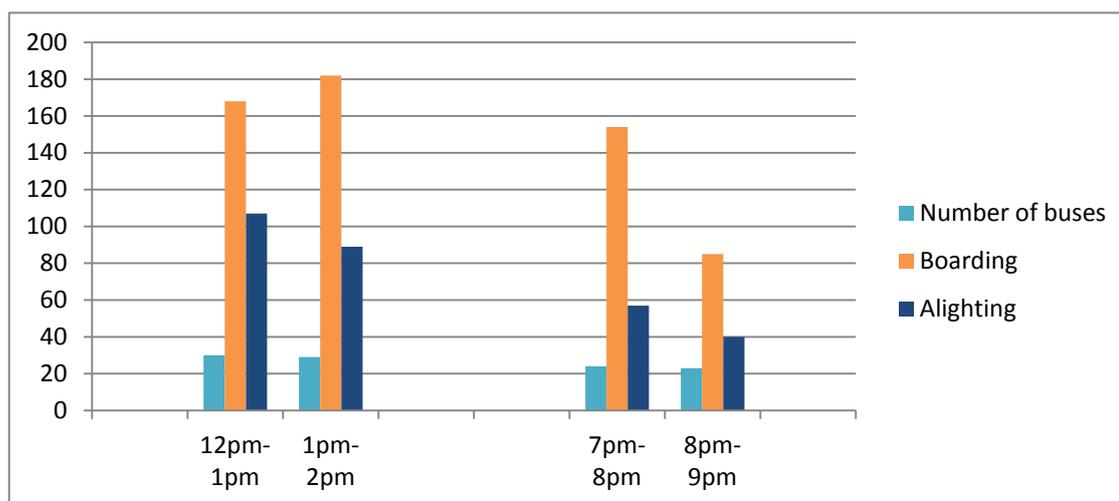


*FIGURE 63: BUS SURVEY RESULTS*

7.4    As can be seen, there is a high level of passengers boarding buses at Victoria, with a lower level of passengers alighting. Bus provision as well as usage was higher at lunchtimes, than during the evening hours surveyed.

7.5    During the lunchtime hours, approximately 350 people boarded and approximately 200 people alighted the 60 buses which stopped at one of the selected stops on Victoria Street.

7.6    During the evening survey hours, 47 buses stopped and 239 people boarded the buses, whilst 97 alighted, which is reflective of the high proportion of visitors (15%) that had arrived in Victoria by bus (see section 3 above).

## Cycle Hire Data

7.7    The following table highlights usage of docking stations within the area.

*TABLE 7: TFL CYCLE HIRE DATA*

| Docking Station | | July 2012 | | | December 2012 | | |
|---|---|---|---|---|---|---|---|
| | Docking points | Hires | Docks | Total | Hires | Docks | Total |
| Cardinal Place | 24 | 2,800 | 2,820 | 5,620 | 1,723 | 1,751 | 3,474 |
| Howick Place | 28 | 1,691 | 2,016 | 3,707 | 930 | 1,037 | 1,967 |

7.8    As can be seen, the docking stations attract similar numbers of hires and docks, and as would be expected is significantly busier during the summer than winter!

7.9    This data shows that cycle hire is popular in Victoria, with the Cardinal Place and Howick Place docking points being well used in 2012.

# 8. Conclusions and Indicators of Health

A wealth of new bespoke primary research, as well as analysis of existing secondary research has been undertaken as part of this Health Check of Victoria. As such, we can conclude the following:

**Consumer Demand**

8.1 As identified in the consumer survey, Victoria attracts a multi-reason visit pattern from consumers. The biggest group (accounting for nearly half of consumers) is workers, followed by shoppers then passers through / and those visiting the area for leisure and tourism purposes.

8.2 The worker / commuter needs are primarily likely to include F&B, service and day to day convenience goods. Comparison goods will also be required but on a less frequent basis. These consumers are likely to be mid market (given the employment profile in the area) and have limited time availability.

8.3 They will require an offer that is easy to understand and easy to use. Multiple retailers and service operators will be of appeal, as they are a "safe" option and present a quick purchase opportunity in the limited lunchtime window.

8.4 F&B / pubs and restaurants are high on the requirements of office workers and indeed were the main choice of products that consumers planned to buy whilst they were visiting the shopping centre.

8.5 Dedicated shoppers will have more demand of specialist comparison goods retailers, which may include a visit to the House of Fraser department store as part of the trip. Cafes and restaurants will also be of some need to these consumers.

8.6 The passers through / leisure visitors will have less need of comparison (other than distress / top-up requirements) and more need of F&B / catering.

8.7 All shopper groups are likely to have an extended day visit pattern and are likely to be using the offer into the early evening.

**Existing Offer**

8.8 The existing offer has an oversupply of comparison goods relative to consumer need. Having said that, this will be influenced by the House of Fraser department store, which adds credence and credibility to the offer and helps to ensure the centre punches above its weight in terms of its retail appeal. Encouragingly, given the high demand for A3 floorspace specified by consumers, this is actually the second highest sector of floorspace, suggesting the offer is in tune with consumer demand. The high levels of vacancy are of no cause for alarm and are purely a result of the significant development underway in the area.

8.9 Going forwards, it is important any new floorspace provides a mix of categories, including service retail and convenience and it is not simply providing significant new comparison retail.

**Improvements Wanted**

8.10 In terms of the retail offer, consumers would like to see the offer improved more so than the environment, with more and better shops; in particular, more food stores / supermarkets, better quality shops and more independent retailers. To a lesser extent consumers also wanted more market stalls, more fashion shops and more cafes and restaurants.

8.11 From the trader perspective, they want more policing / safety, improvements to the retail offer and pavements / roads / buildings and to a lesser extent more public seating.

**Comparison to Previous Health Check**

8.12 The area has seen much and ongoing development since the last Health Check was undertaken. Retail floorspace has risen, albeit the mix stayed similar. The area has improved in environmental quality as well as cleanliness. The retail profile has improved significantly as has the F&B provision. Perceptions of security levels have improved and the visible anti-social behaviour is no longer the issue it was. In summary the area has improved both as a retail destination and in terms of its retail appeal.

# 8.   Conclusions and Indicators of Health

**Retail Performance and Outlook**

8.13   From the consumer perspective, the picture is quite positive, with the centre attracting a multi-visit trip pattern. This also influences the frequency of visit, as whilst at first glance the centre appears to have a lower frequency than most of the other centres in the programme, this is being influenced by the higher numbers of passers through, leisure and tourist visitors.  Consumers are visiting broadly at the same frequency as they did last year and are positive about the accessibility of the area, safety / security and cleanliness. The least rated areas were events, car parking charges and availability, as well as liveliness / street life / character.

8.14   Usage of the night-time offer is good and the offer is clearly thriving. Overall, circa two thirds of consumers are satisfied with Victoria as a place to shop and whilst few are unsatisfied, 20 % of consumers are neither satisfied nor unsatisfied, suggesting a degree of apathy or ambivalence in regards to the offer.

8.15   Unusually and encouragingly, the picture from retailers is much more positive. Whilst many operators have traded in the area for some time, there is a healthy churn of new entrants coming to the area, and the vast majority of operators stated that they intend to stay in the area or indeed to expand if possible.  The area is rated positively across most aspects by operators, particularly for the range and quality of shops, services, places to eat and drink, public realm, overall cleanliness, signage / wayfinding, access by public transport and both daytime and night-time security.

8.16   Only parking (availability, restrictions and charges) generate an outright negative rating.  Even rents scored a neutral / slightly positive response, which is highly unusual for this type of survey.

8.17   The outlook is positive, with most retailers expecting the economy to improve or at least maintain existing levels (third highest result in the programme after Marylebone High Street and Baker Street). The majority of operators would recommend the location as a place to trade, and are also similarly optimistic about future trading opportunities in the area.  Most retailers are pleased with the performance of their business and indeed the majority stating that their trading performance was up on the previous year (albeit most slightly so, although still a very good result).

8.18   So overall, a very positive picture from retailers.  The area already attracts huge numbers of footfall (highest in the study programme).  The area is experiencing huge levels of investment and regeneration focus and the current picture of performance and footfall levels is set to get even better. Rental levels on Victoria Street are high (especially for smaller retail units) and appear to be rising (albeit based on a small sample group). Usage of the cycle hire points is also high in summer.

8.19   Whilst crime levels are of concern, as is litter and poor maintenance of the streetscape outside a number of entrances of Victoria Station, on the whole the centre provides a positive and appealing shopping offer for the multitude of consumers in the area for many different reasons.

# 8.  Conclusions and Indicators of Health

**Portas Review Compliance**

8.20  In December 2011, Mary Portas delivered her review of the future of high streets across the country and pulled together examples of how high streets can help themselves and improve going forward.

8.21  Although many of the recommendations are generic national aspirations, we have extracted, summarised and amalgamated key recommendations from that report and assessed the extent to which the measures are already in place at Victoria Shopping Centre.

*TABLE 8: PORTAS PILOT COMPLIANCE*

| Recommendation | In Place? | Comment |
|---|---|---|
| Introduce Town Team, with focus on improved access | ✗ | This could be a useful initiative for the area (although not necessarily to improve access, more to obtain support from ATCM and funding availability from DCLG) |
| Empower local BIDs | ✓ | The local BID is active and has wide support |
| Make it easier for people to become market traders | ✓ | This is an active policy of the Council, although there are only two active pitches in the area, Victoria is supported by the nearby Strutton Ground and Tachbrook Street markets, and Cardinal Place offers a food market every Thursday lunchtime (11am-3pm) |
| Use business rates to support small businesses and independent traders | ✓ | Not current Council policy |
| Introduce free local controlled parking schemes | – | Not needed as most people either walk or use public transport |
| Make it easier to change the use of properties | ✓ | Government changes to permitted development rights are now in force |
| Introduce presumption of town centre first policy | ✓ | Already Council policy |
| Large retailers to support and mentor local businesses | – | Not needed, the offer is multiple dominated already |
| Local Authorities to introduce compulsory purchase orders to improve key retail space | – | CPO powers were used for site assembly to allow Land Securities' Nova scheme to go ahead.  Such powers are only used by the Council in the most exceptional circumstances. |
| Encourage Local Authorities to force owners to improve long term vacant shops | – | Not applicable / needed |
| Get people more involved in Neighbourhood Plans, including focus on High Street | ✓ / ✗ | This will naturally occur as the BID continues to grow in profile and awareness.  More visible consumer BID events will help to achieve this. The Neighbourhood Area designation for Victoria granted on 04/09/13 will also help. |
| Support community use of empty properties | – | Not applicable |

8.22  Overall, for the policies which are relevant and appropriate, Victoria Shopping Centre can be said to be compliant with the core aspirations of the Portas Review.

# 8. Conclusions and Indicators of Health

**Priority Actions Needed**

8.23 From the research undertaken as part of this project, we would recommend the following initiatives are prioritised for Victoria:

1. Stimulate / lead the formation of a Town Team to access support from the Association of Town Centre Management, as well as lessons learnt / best practice adopted elsewhere in London, e.g. Forest Hill Portas Pilot. This initiative could be provided by or managed by the BID.

2. Work with the BID to help them plan for and stimulate more events and activities.

3. Encourage more visiting and themed markets, especially on weekdays, including lunchtime and night (early evening) markets. More weekly foodmarkets, including Farmers Markets, new wave street food and international themed food events could all be appropriate. It would be better for the area if these markets move around the centre on a regular basis. Consider permitting small clusters of market stalls, i.e. Micro Markets as described in the recent South Westminster Markets Study undertaken by The Retail Group on behalf of the Council.

4. Note this needs to be carefully co-ordinated, as part of clear annual events programme.

5. Investigate potential to create limited number of additional street trading pitches, with rotating or good quality market traders on different days.

6. Encourage local landowners to plan for providing new quality foodstores in the area.

7. Encourage landowners to also target more high profile / experiential restaurants (as upgrades as well as new premises). Examples include Searcy's Champagne and Oyster Bars, Hawksmoor, Jamie's Diner, etc.

8. Encourage local retailers to run and participate in joint and themed promotions.

9. Identify opportunities to improve the pedestrian experience and extend the visit, include more greening, more seating / places to sit, more public art and even pavement table tennis within private development schemes.

10. Develop one or two recognised annual events that provide identity and sense of place for Victoria. This could include an annual Food Festival or Westminster Parade.

11. More visible security / policing are needed, according to retailers.

12. Monitor the retail performance of the area on a regular basis.

13. Encourage the improving of linkages and inclusion of edge of centre or nearby retail facilities, Strutton Ground, Tachbrook, Caxton Street, etc. as part of ongoing promotions.

14. Improve access to and promotion of softer greener areas nearby, to counter balance high traffic volumes on core arterial roads.

15. Develop clear signage for 'shopping areas', 'dining quarters', etc. particularly for visitors and irregular visitors.

16. Introduce the 'Victoria Value quality assurance charter' for service and customer care, i.e. defined local customer service policy, promoted by the Council, BID, land owners and delivered by retailers.