

BENTALL  
CENTRE  
KINGSTON

# KINGSTON

## THE BENTALL CENTRE



# INTRODUCTION

The Bentall Centre has a best-in-class line up of retailers and is the dominant retail destination in this bustling commuter town, 28 minutes from London Waterloo.

“The Bentall Centre has been the primary centre for retail, as chosen by Kingston shoppers and leading retail brands, for 25 years. Our investment and asset management strategy will ensure that it continues to offer customers an unrivalled retail shopping experience, and our retail partners the best destination in town from which to position their brands.”



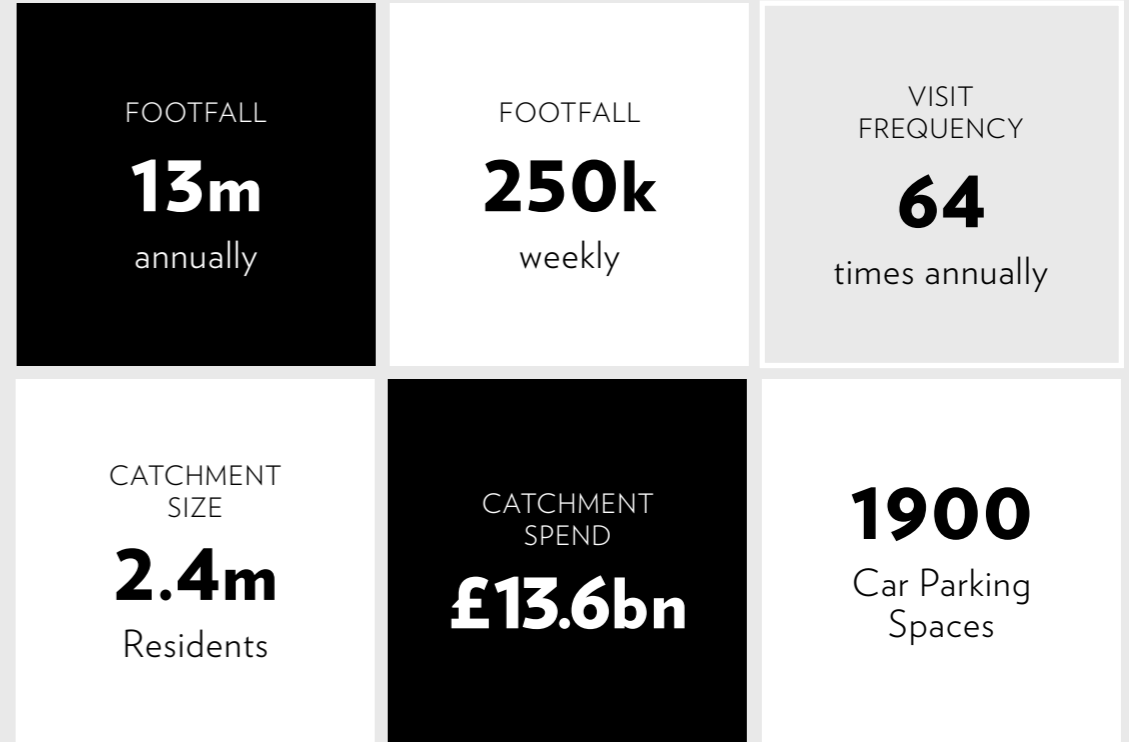
**Tony Christie**  
Head Of Retail

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# CENTRE POSITIONING AND PERFORMANCE



THE BENTALL CENTRE ATTRACTS A **MORE AFFLUENT AUDIENCE** THAN RESIDES IN THE CATCHMENT.

CONSUMER V CATCHMENT	CATCHMENT	THE BENTALL CENTRE	
<b>BUSINESS ELITE</b>	20.9%	<b>24.0%</b>	<b>+3.1%</b>
<b>PROSPEROUS PROFESSIONALS</b>	5.2%	<b>6.9%</b>	<b>+1.7%</b>
<b>FLOURISHING SOCIETY</b>	12.2%	<b>21.0%</b>	<b>+8.8%</b>

Source: Javelin Research 2017





## RETAIL ANCHORS

The Bentall Centre is anchored by the Fenwicks owned, Bentalls Department Store and is one of the largest stores in their portfolio. Its luxury fashion, cosmetics, homewares and electronics complement the Bentall Centre retail line-up, ensuring the The Bentall Centre is the dominant retail centre in town.

Zara, H&M and Apple have all invested in large showcase stores in the centre.



# NEW RETAIL

Retailers frequently choose the Bentall Centre as their first location outside of London to establish their brands, test new store concepts and launch product ranges. Many retailers regularly invest and refresh their stores. In 2017, 10 new stores opened in the Bentall Centre.

“THE BENTALL CENTRE ACCOUNTS FOR **33% OF SALES FROM 32% OF SPACE IN KINGSTON.**”

**15**  
REFITS,  
RELOCATIONS  
AND UPSIZES  
IN 2017

**640k**  
Sqft

**10 NEW STORES** OPENED IN 2017

ZARA

west elm

BOSS  
HUGO BOSS

NYX  
PROFESSIONAL MAKEUP

Typo

Entertainer  
TheToyShop.com

vision express

OLIVER BONAS

TORTILLA  
Real California Tortillas & Tacos

SAMSUNG

**70**  
Over 70 retailers  
and restaurants

“RETAIL PRODUCTIVITIES ARE IN LINE WITH **GLASGOW, MANCHESTER AND LIVERPOOL.**”

**↑10%**  
NEW STORE  
SALES DENSITY  
IS 10% ABOVE  
ASSET AVERAGE



Hugo Boss opened 2017



New Zara store



First store outside Central London



First store outside Central London



Proposed dining on the second floor



Tortilla opened 2017



New Maison Du Mezze opened 2018

**21.4%**

F&B SPEND IS 21.4% ABOVE THE UK AVERAGE

**£768**

ESTIMATED F&B SPEND PER CAPITA IN KINGSTON IS £768

## CINEMA AND RESTAURANTS

In its 25th year as the prime retail destination in Kingston, The Bentall Centre will welcome a four-screen boutique cinema and four new restaurants to provide its loyal and affluent shoppers with a premium casual dining and social destination to complement its already thriving fashion and lifestyle retail mix.

“When deciding where to open new cinemas, Kingston was a priority destination with The Bentall Centre and its central location an obvious choice for us. Our approach to modern cinema is to create amazing destination venues and the unforgettable customer experience we provide aligns perfectly with the consumer experience strategy The Bentall Centre team is developing and delivering”

**Philip Knatchbull** | Chief Executive Officer  
**CURZON**



Proposed outdoor terrace and open air cinema

# REVITALISATION

The Revitalisation programme commenced in Autumn 2017 and included the rightsizing of major brands and flagship stores, the continued addition of best in class and new to UK market retail brands, a full refresh of the centre interiors and entrance statements and the addition of facilities and services to enhance customer experience.



Proposed upper elevation of Clarence Street entrance



Proposed Fife Road entrance





## HOW OUR CUSTOMERS SHOP

Our loyal customers visit the Bentall Centre frequently, staying longer and spending more money than in comparable retail destinations.

**64**  
times

ANNUAL VISITS

VISITOR FREQUENCY

**26%**

Weekly

**14%**

2/3 week

**5%**

Everyday

“THE BENTALL CENTRE IS THE PRIMARY REASON TO VISIT KINGSTON FOR **64% OF VISITORS.**”

**59%**

CONVERSION RATE Q4

**43%**

NET PROMOTER SCORE

**57 min**

AVERAGE DWELL

**£135**

AVERAGE CONSUMER SPEND PEAK

**£75**

AVERAGE CONSUMER SPEND OFF-PEAK

“THE BENTALL CENTRE HAS THE **HIGHEST AVERAGE SPEND** AMONGST ALL SHOPPING AREAS IN KINGSTON.”

Source: Data Javelin Research 2017



West Elm first store outside Central London



# KINGSTON UPON THAMES

Kingston is a thriving modern market town situated on the busy banks of the River Thames, just 28 minutes away from Central London.

**21%**

**Business Elite** account for 21% of Kingston catchment, **over 3 times the UK average.**

**24%**

24% of The Bentall Centres visitors are Business Elite, **3% higher than catchment.**

AVERAGE SPEND

**16%**

Average non-Grocery spend is **16%** above UK average

HOUSEHOLD INCOME

**53k**

Average household income is 53k per annum

HOUSEHOLD INCOME

**51%**

Household income within Kingston is 51% above the UK average

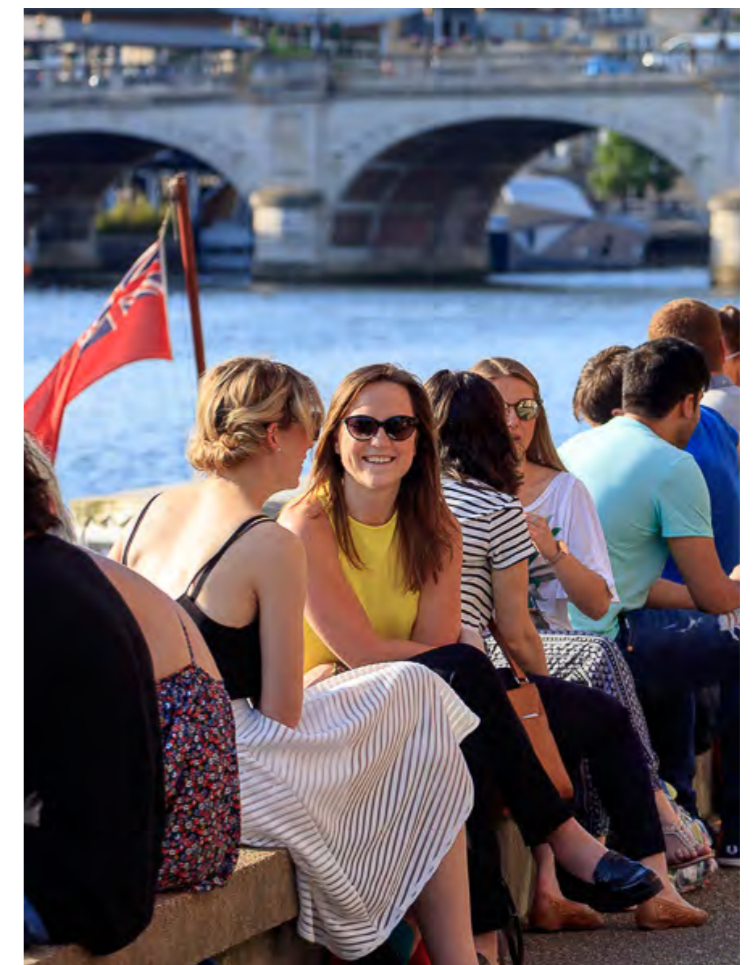
**51.9%**

**51.9%** of the Bentall Centre consumers are from the high affluent groups of **Business Elite, Prosperous Professionals** and **Flourishing Society.**

KINGSTONS RETAIL PRODUCTIVITIES ARE COMPARABLE WITH **MANCHESTER, GLASGOW** AND PERFORMS ABOVE MAJOR CITY AVERAGES.



Source: Javelin 2017 - SHOPSCORE



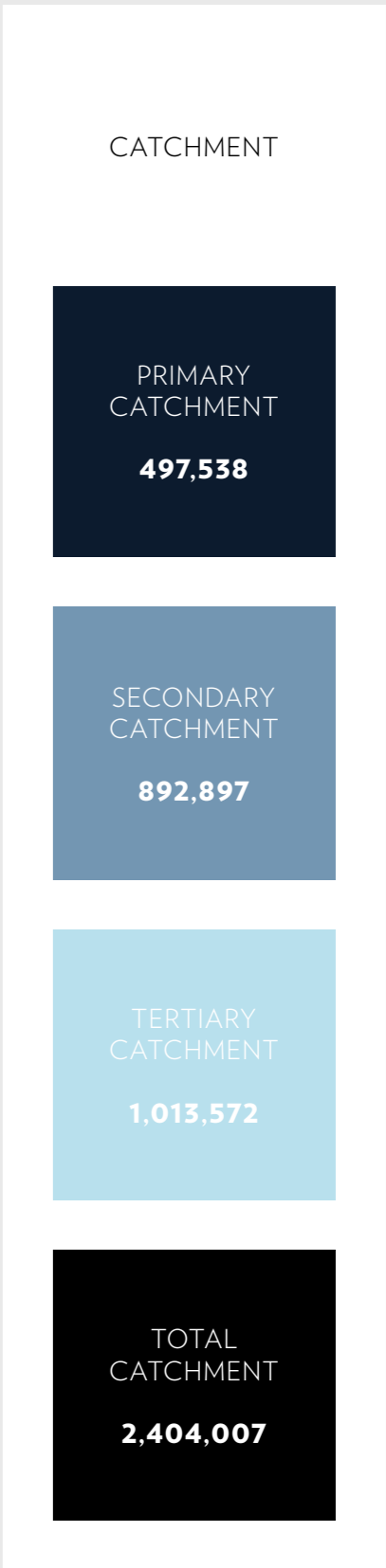
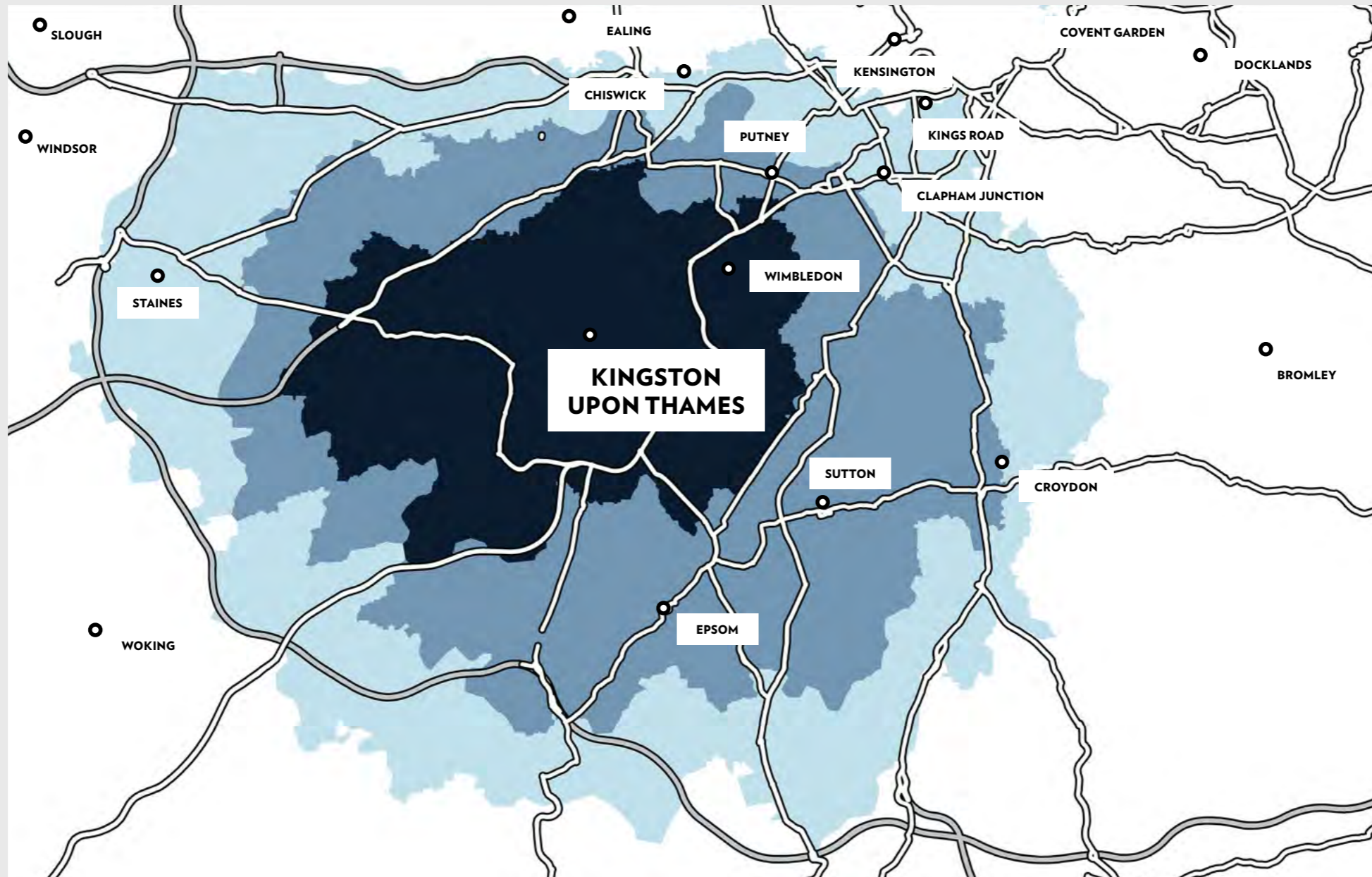
# THE CATCHMENT

Source: Data Javelin Research 2017

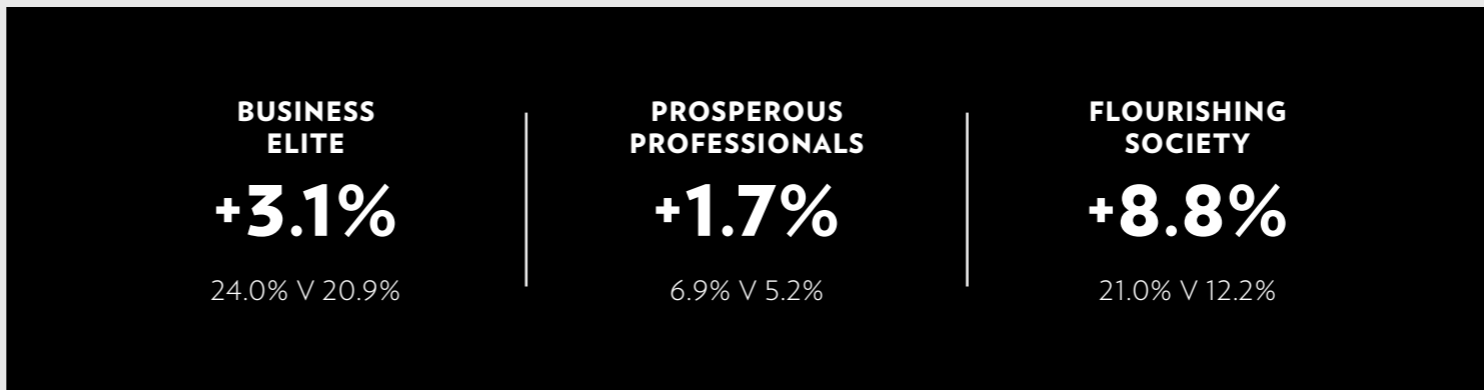
**2.4m**  
TOTAL  
CATCHMENT

**13.6bn**  
AVAILABLE  
CATCHMENT  
SPEND

KINGSTON  
UNIVERSITY  
**20,000**  
Students



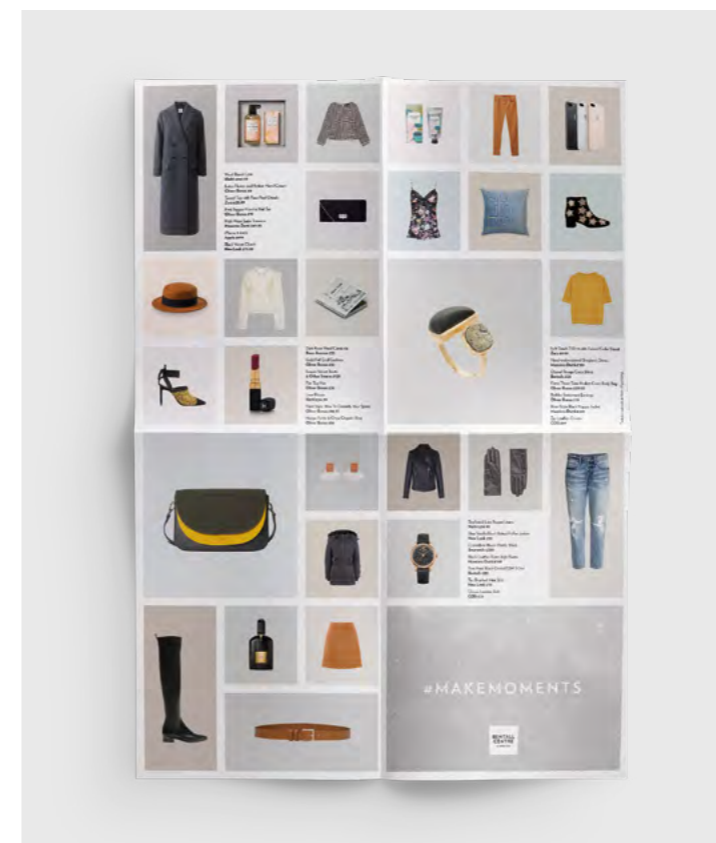
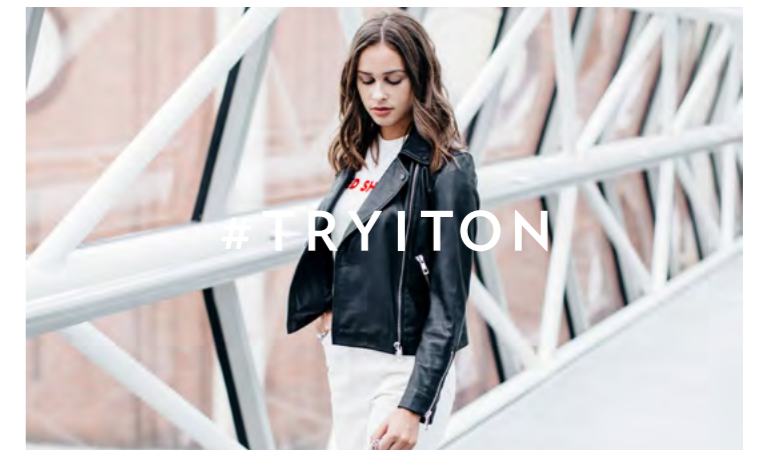
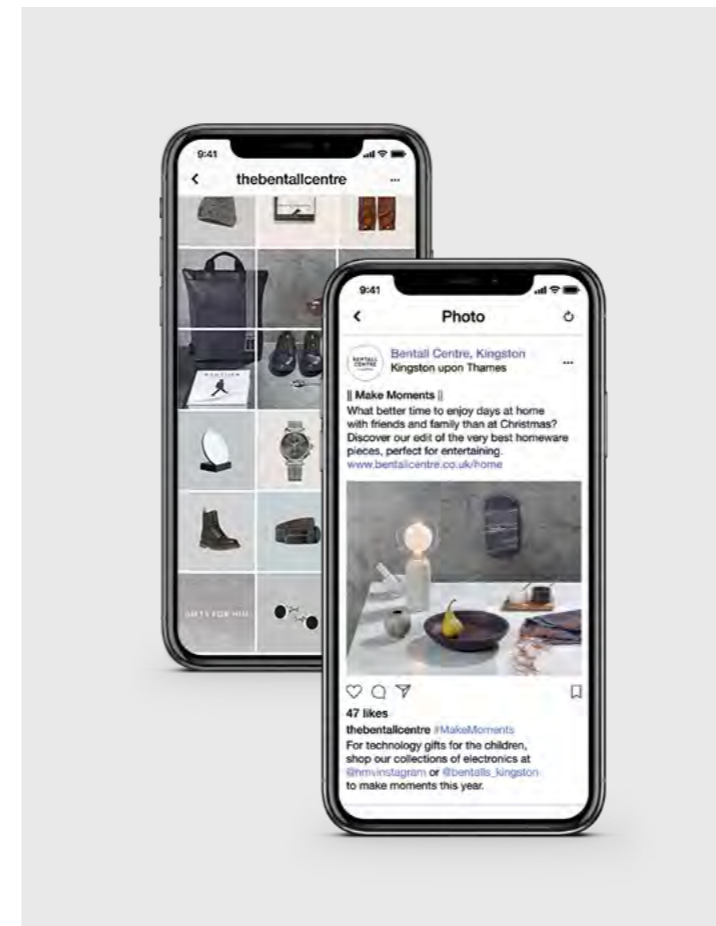
THE BENTALL CENTRE CONSUMER IS **MORE AFFLUENT** THAN THE CATCHMENT.



# CONSUMER ENGAGEMENT

Source: CARAT Media and Blackline

In Q4 2017 we launched a revitalised communications programme, aligned to retail customers trading plans, tailored to target audiences and driven by video, digital and social media. The results included:



<i>&amp; other Stories</i>			<b>Bentalls</b> A FENWICK STORE		<i>Boux</i> — AVENUE —	CHISHOLM HUNTER DIAMOND MERCHANTS Est. 1857	<b>claire's</b>		COS
	<i>David Clulow</i> opticiens	<b>Dune</b> LONDON		ERNEST JONES LOVE & LIFE	ESSENTIAL	<b>FATFACE</b> UNITED KINGDOM	FRASER HART FINE JEWELLERS SINCE 1936	<b>Fuel</b> Juice Bars	
		<i>H&amp;M</i>	<b>HAIR</b>	<i>havaianas</i>	<b>hmv</b>		<i>H&amp;M</i> HOME	<b>BOSS</b> HUGO BOSS	<i>H&amp;M</i> KIDS
<b>kikki.K</b>	 LEBANESE KITCHEN	<i>Massimo Dutti</i>		NEW LOOK MEN	<i>Millie's</i> COOKIES	<b>MOKA</b> LONDON	mothercare	NEW LOOK	<b>NYX</b> PROFESSIONAL MAKEUP
<b>O<sub>2</sub></b>	OLIVER BONAS	PANACEA health & beauty	PANDORA™	<i>Papurchase</i>	<i>Paris's</i> BEAUTY	RADLEY LONDON	REGIS	<b>sky</b>	<b>SAMSUNG</b>
<b>Smiggle</b>	SOFA WORKSHOP our craft, your creation	SOLE TRADER BRANDED FOOTWEAR ONLINE AND IN STORE		<i>supercuts</i>	<b>Superdry</b> 超乾燥(しなざい)	<b>SWAG</b> — JEWELLER —		EST 1898 <b>T·M·LEWIN</b> JERMYN ST. LONDON	<b>T2</b>
<b>The Entertainer</b> TheToyShop.com	<b>Timberland</b>		<b>TIMPSON</b> Great Service by Great People	TOMMY HILFINGER	<b>TORTILLA</b> Real California Burritos & Tacos	<b>Typo</b>	<b>VAGABOND</b> SHOEMAKERS	vision express	
<b>The WATCH Lab</b> Quality watch repairs	<b>W</b> Waterstones	west elm	 CHELSEA 1886	WHSmith	 SHOPPER'S CRÈCHE	<b>YD!</b>	<b>ZARA</b>		ZARA HOME



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