

# South Kensington Station Future Retail Strategy

**Interim Report** – Presentation to the Consultative Working Group,  
on behalf of



Prepared by The Retail Group

6 July 2016

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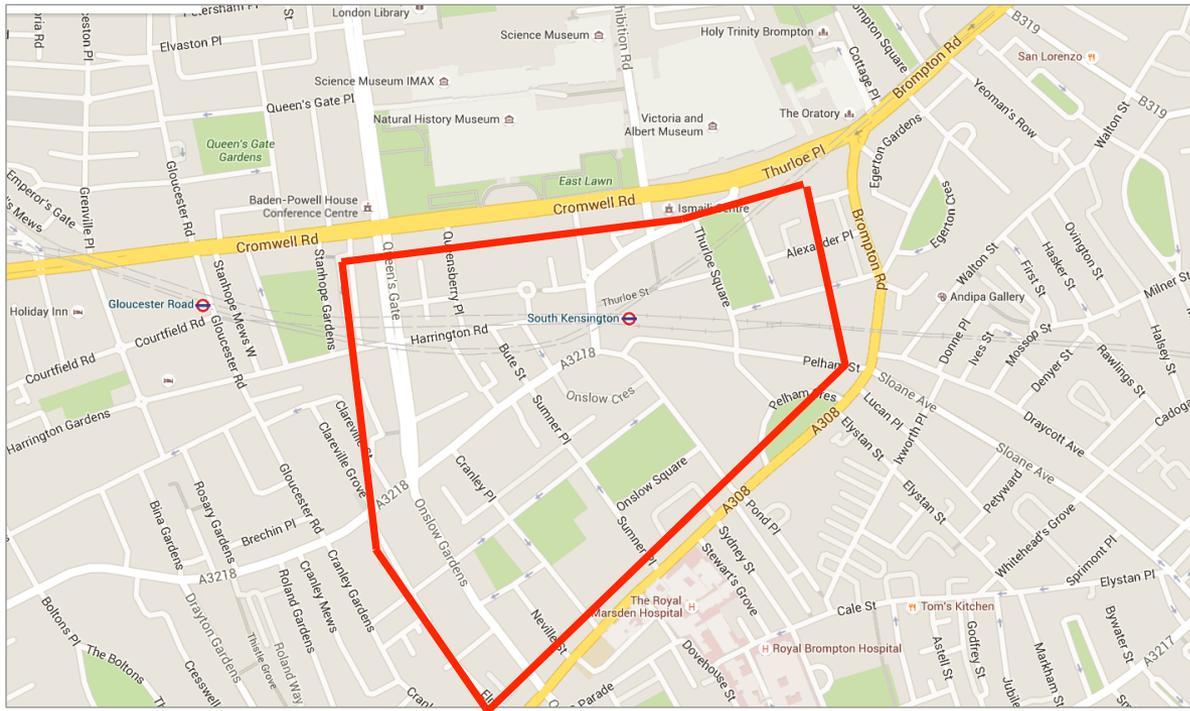
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# Project Objectives

## Summarised from the project proposal:

1. Identify, quantify and qualify the available consumer groups
2. Engage with local stakeholders to canvas views and opinions
3. Assess the existing offer and identify gaps
4. Identify future retail opportunities that the future station offer could satisfy

# Study Area



**Project is focused on area highlighted**

Includes South Kensington station and retail activity around it

Extends to Museums but does not include them

Includes local resident area that will look to the station as a focal point for transport; and the local 'retail' offer

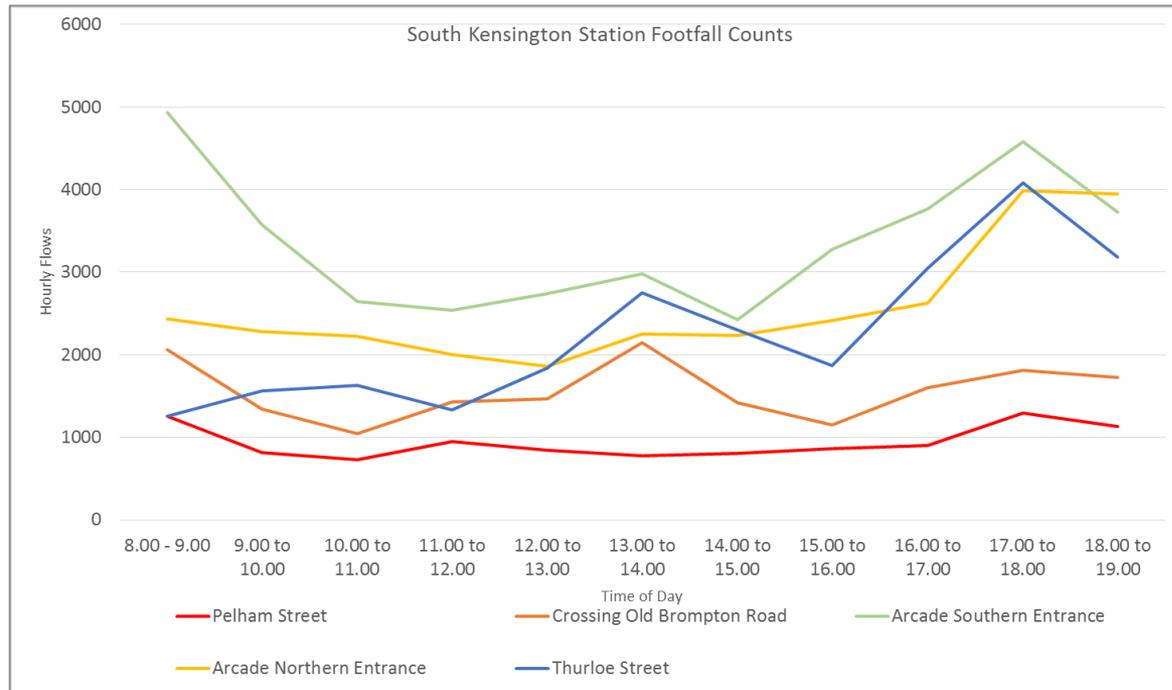
# Footfall Study

# Methodology

- Focussed survey undertaken on Thursday 16 June and Saturday 18 June 2016
- Aim was to assess general footfall movements around the station, in order to inform Retail Strategy. 5 points counted as shown

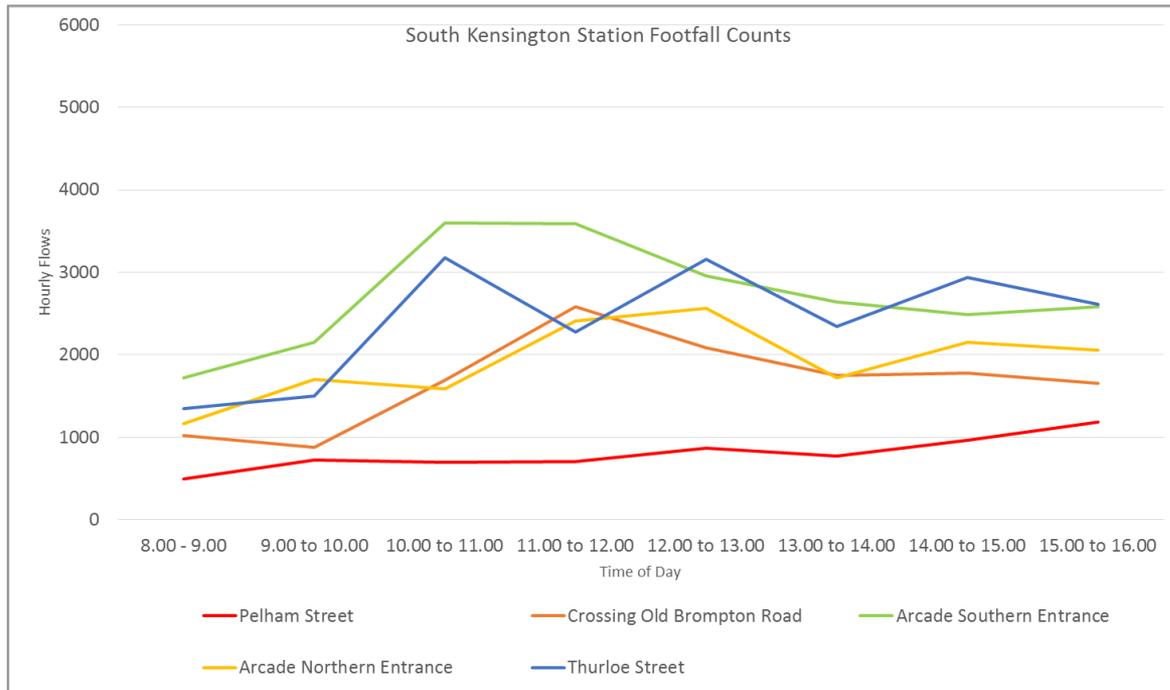


# Thursday Footfall



- Very noticeable early morning and evening peaks, lots of commuters to / from area
- Southern exit to Station Arcade is busiest
- Pelham Street is busy - attracts circa 1/3 footfall of the peak footfall flows captured in this study

# Saturday Footfall



- On Saturday the area gets busier over the course of the day
- Again, the Southern exit to Station Arcade is busiest, closely followed by Thurloe St
- Pelham Street attracts circa 1/4 footfall of busiest footfall flows on Saturdays

# Further Footfall Findings

- Workers are a key customer group – clear peaks evident on weekdays (both rush-hours and lunch time)
- Furthermore, weekdays are busier than weekend days, by some margin
- The area is a clear destination on Saturdays
- Area immediately to south of station is busiest
- Pelham Street is busy on weekdays and to a lesser extent on weekends – clear evidence of use as a cut through / route
- The busier locations achieve well over 200,000 footfall movements per week
- The area is busy all day and everyday. Both Thurloe Street and Pelham Street are viable locations based on current footfall levels

# Operator Survey

# Methodology

- Survey of operators in streets surrounding station undertaken by The Retail Group
- Excellent response achieved – 50 surveys collected from circa 70 handed out
- Good cross-section of business types, including Food & Beverage (F&B), service providers, comparison goods and food convenience stores
- Food and Beverage (46%) operators were the dominant business type, reflecting the mix of the area

# Operator Survey Summary

- Whilst all customers are important; residents, overseas and domestic visitors are considered the most important to respondents individual businesses, followed by workers
- Visiting Museums and Galleries tops the list as the main reason for visiting the South Kensington area, mentioned by 88% of retailers
- Other important visit drivers, each mentioned by 60-70% of respondents' were; working in the area, studying in the area, visiting the Royal Albert Hall and living in the area
- Peak trading times are towards the end of the week; Friday the busiest, followed by Saturday
- Lunchtime followed by the afternoon are considered the busiest times of day, both weekdays and weekends
- Catering operators (cafes, coffee shops and sandwich bars) are considered the busiest / most popular types of retail, followed by food / grocery stores (albeit at a lower level)

# Operator Survey Summary contd.

- Mixed trading performance reported – similar numbers up / down / level
- ‘More independent retailers’ and ‘more retail shops in general’ were categories most wanted by retailers
- In terms of retail names or brands operators would like to see open near the station, there were no significant trends apparent. 60% of retailers gave no opinions
- The most commonly mentioned (2-4 responses) were McDonalds, KFC, more independents, Greggs, JLP, M&S, Boots and H&M
- 72% of operators would recommend South Kensington as a place to trade
- 62% are optimistic about future trading prospects in South Kensington
- A further 60% are pleased with the current performance of their business

Survey Monkey

# Methodology

- Short on-line survey of consumers developed, with questions included on home address, frequency of use of the area, improvements needed and retail brands most wanted
- Promoted via the <http://southkensingtonstation.co.uk> website and Discover South Ken
- 230 responses received of which 100 lived in SW7 postal area

# Results: Survey Monkey

- Circa half of consumers visit daily, with further third visiting 4 – 6 times per week
- 92% visit more frequently than weekly; high repeat visit frequency, 'locals', residents and workers
- Local residents and workers want 'more independent shops', 'more convenience food', 'more service retailers' and a top-up foodstore
- There was on balance support for 'more shops' and 'more aspirational shops'
- 'More cafes' was split exactly down the middle in terms of equal numbers wanting more and those not
- Typically respondents do not want 'more restaurants' or 'bigger shops' although a few do
- Local residents (those living in SW7) were especially of the opinion the area needs more independents and convenience food but not cafes or bigger stores

# Retailers Identified by Survey Monkey Consumers

In terms of missing retailers / fascias most wanted ...

- M & S / Simply Food - 29 mentions
- Waitrose – 17
- More independents – 16
- Sainsbury – 15
- Books / Cards – 9
- More fast food – 9
- Boots – 9
- More convenience food – 7
- Oliver Bonas – 5
- More banks – 5

In Summary

# In Summary

- The area attracts high numbers of consumers, including domestic visitors, international tourists, workers and local residents
- There are lots of reasons to visit – its busy as a result!
- Estimated weekly footfall flows at the busiest locations are over 200,000. This would be similar to a major shopping street such as Knightsbridge! Pelham Street footfall levels are currently higher than Marylebone High Street
- Weekdays are busier than weekends – workers are a key target
- Local residents tell us they want more independents in the area, as well as a top-up foodstore (M&S Food / Sainsbury / Waitrose), Boots, book / card shop and independents in general. They are split about more cafes, and do not want bigger shops or more restaurants

## In Summary contd.

- Current performance is mixed, however most retailers would recommend the location as place to trade and have a positive view about its potential
- Research findings completed to date suggests the opportunity for the future South Kensington Station retail offer would seem to be in good quality independents and a few quality retail brands, supported by quality convenience food, day to day / top-up comparison goods and a strong service offer. There are also opportunities to improve the F&B offer. Higher quality and good variety are common themes
- More to come – next steps ...
  - Analysis of customer spend data / lifestyle and customer segmentation
  - Further stakeholder consultation
  - Location review
  - Benchmark location review
  - Develop Future Retail Strategy

# The Retail Group

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