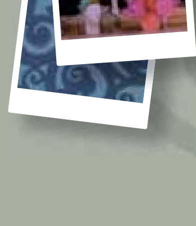
THE RETAIL OBSERVATORY

Commercial development perspective

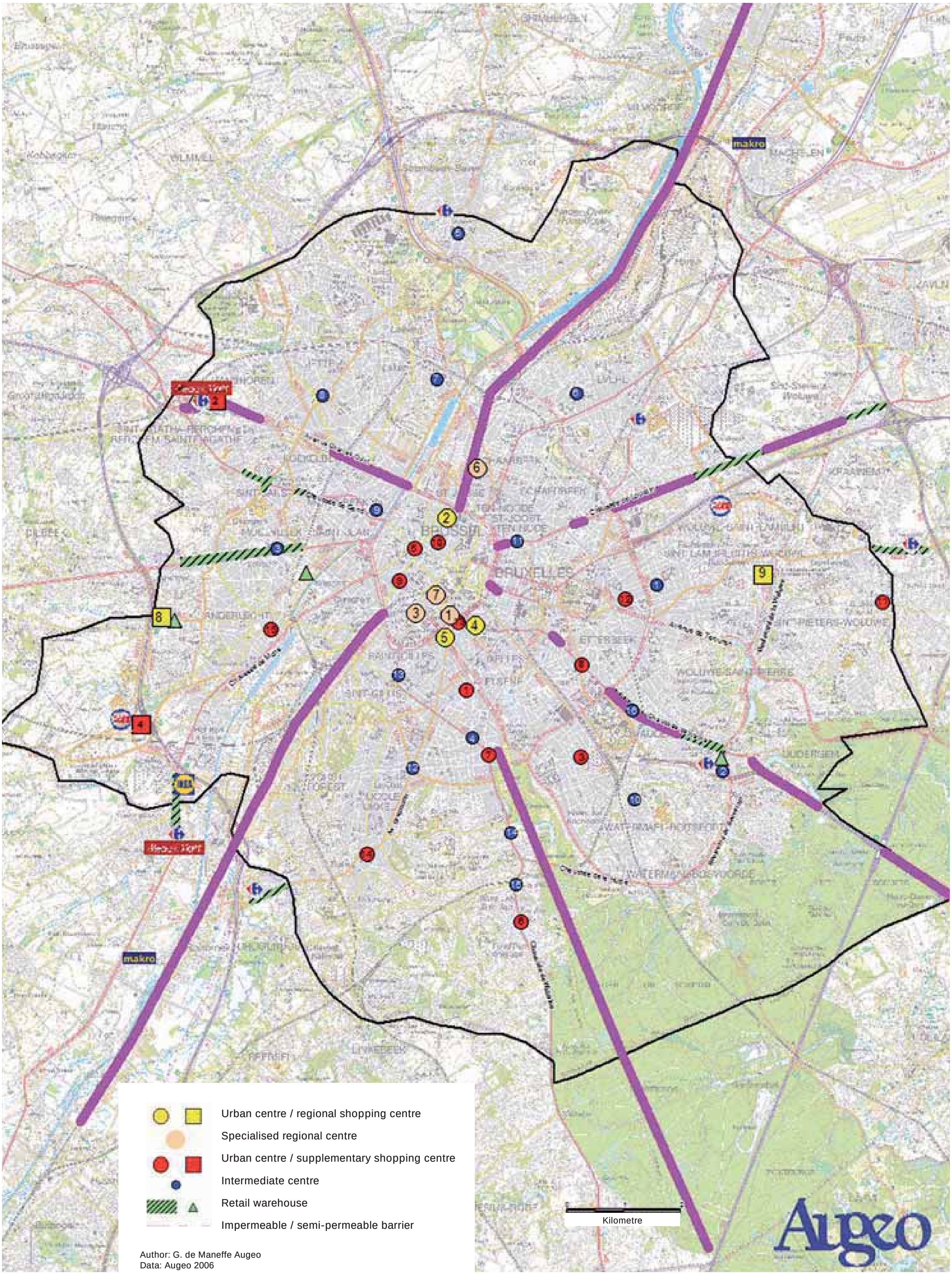
for the

Brussels-Capital Region

2008



Commercial centres in the Brussels-Capital Region



Foreword

Bringing a fresh dynamism to commerce is one of the priorities of the Brussels-Capital Region. With its 18 malls, its four shopping centres and more than 20,000 shops, commerce, including hotels and catering and the wholesale trade, employs more than 100,000 people in Brussels and represents about 39% of the total turnover in the Brussels Region.

This wish to revitalise the sector is part of a project which goes further than simple economic development. It forms part of a city project promoting mixity, flourishing neighbourhoods and attractive commerce. It was an aspect of the first PRD and led the Region to introduce measures for the revitalisation of trading districts, a task entrusted to the Atrium agency.

Though Brussels has many advantages which almost consistently place it in the top five first-rank international cities, after London and Paris; nevertheless, nothing can be taken for granted. Brussels today must face up to the increased competition from other cities and capitals, not least in Europe.

Further, in the ULB study of developments in retail trade, the Region's Retail Observatory has exposed the extent to which shopping locations are changing within neighbourhoods.

This why it is important for the Brussels-Capital Region to adopt a tool like the Commercial Development Perspective.

This perspective aims not simply to provide a snapshot of the existing situation – an analysis of the Region's commercial structure and the identification of customer behaviour and purchasing flows – but to provide assistance in determining the priority measures to be taken in existing commercial centres. In relation to the development of new superstores, it should be stressed that at this stage this is mainly a descriptive tool. The commercial perspective tool, which will be based on the work presented in the publication, is currently being drafted via an operational study of new commercial developments.

It was essential that this overview be established at the regional level. Though socio-economic permits at present fall within the remit of the municipalities, an overall strategy is required, all the more since the idea of entrusting these powers to the Regions is gaining ground in institutional negotiations.

Our aim, through the Commercial Development Perspective, is to establish the basis of a long-term commercial strategy in conjunction with both the next Regional Development Plan (PRD) and the International Development Plan; a strategy which is consistent, collaborative and effective, fit to make Brussels an attractive city in which shopping is a real pleasure for Brussels residents as well as for all the city's users and occasional visitors.

We hope that you will find it interesting reading.

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Introduction

The Commercial Development Perspective for Brussels responds to a dual need: it simultaneously analyses commerce trends in the Brussels-Capital Region (Brussels-Capital Region), and provides decision-makers with a strategic and operational tool.
To achieve this, the Minister-President of the Brussels-Capital Region commissioned a study that would:

1 Analyse the commercial structure of the Brussels-Capital Region and its operation,
2. Identify behaviour and purchasing patterns of customers in and outside the Brussels-Capital Region,
3. Establish a hierarchy of the different commercial nodes and measure their degree of attraction.

The Brussels Regional Government already has a series of tools which have helped it to keep its policies as relevant as possible to retail trade. These include the Regional Development Plan (PRD), the Regional Land Use Plan (PRAS), the Regional Planning Regulation (RRU) and the manifesto for dynamic trade in Brussels, as well as the «IKEA» law on the authorisation of commercial developments. Local tools include Municipal Development Plans (PCD), Special Land Use Plans (PPAS) and commercial neighbourhood contracts.

The current ambitions for retail trade are explicitly set out in one or another of these documents which have regulatory status, and in the commercial neighbourhood contracts, which influence the functional or conceptual attraction of what is available:

› Improving the commercial, cultural and tourist appeal of the Region,
› Improving the quality of life and the convivial nature of neighbourhoods,
› Promoting a solid supply of commercial activities in Brussels,
› Improving existing commercial structures,
› Ensuring the development of an overall balance between the major economic and commercial clusters,
› Improving existing commercial structures.

With this in view, certain areas and key zones have been reserved to new developments, trading districts will be made more accessible, and commercial nodes should be promoted. Efforts have been focused on infrastructure, the management of public space, and urban renovation. Synergies are emerging between spatial planning and economic sectors.

But between different levels of regional hierarchy, with the impact of the development and operation of commercial concentrations which greatly exceed the boundaries of the Brussels municipalities, there has been an absence of shared vision and uniform measures for retail trade.

PART I

Trends and development in the retail market

SUPPLY-SIDE TRENDS AND DEVELOPMENTS

Technological developments

Technological developments are the prime mover in the process of change, not least in retail trade, in terms of the range of products on sale as well as sales methods.

Against this background, the main trends are as follows:

› More rapid, cheaper and better quality technology,
› An increase in the digital infrastructure,
› An increase in the use of computers, the Internet and mobile telephony,
› An expansion of distribution options thanks to the digitalisation of media and the different types of entertainment,
› Increasing mobility.

But Belgium nevertheless lags behind its neighbours.

Uncertain product development

The range of products available rises by 50 to 70% every 10 years. Given the certainty of change, there is uncertainty regarding the manner in which these changes will come about. What products, formulae, chains, and channels will create value in 10 years' time?

The creation of chain stores and the internationalisation of retail trade

The city centre landscape has changed profoundly with the appearance branch chains in commercial zones (market share estimated at 40% of all shops). The proportion of independent shops is lower in retail grocery than in non-food. We are not only witnessing an increase in European names; the number of non-European chains also continues to rise

Growing competition in the best commercial zones has driven up rents and forced out many independent retailers towards secondary areas. As a result, the main commercial streets in Brussels are increasingly all the same.

% of citizens shopping within the region and private purchases over the Internet

	Internet purchases	In the country only	within EU15, Europe	and outside EU15
Belgium	12%	34 %	51%	8%
France	7%	68%	23%	3%
Netherlands	28%	47%	38%	6%
Germany	32%	50%	40%	7%
United Kingdom	33%	63%	9%	3%

Source : European Commission, EUROBAROMETRE, Euroflash 135 (2002)

Differentiation of supply by location
Names which were previously present on the periphery are now found in town centres. Conversely, the shops which were previously only found in town centres are now seeking to establish on the outskirts.

Loss of various business types, or parallelisation
There is also an increasing trend towards the overlap of different types of range in all business types, caused by the possibility of attracting customers with irresistible offers, presenting as wide a range as possible, and making higher profits.

Increase in shop size
Shop size is increasing, particularly on the periphery, to the detriment of town centres.

Reduction in shop size and retail specialisation
As a reaction to the increasing size of some shops, many others are reducing their surfaces and offer a specialist range of very high quality goods, with a high level of service.

Integration of several functions
In order to draw out the time spent by customers in the shop, we are also witnessing a proliferation of formulae which combine several functions (retail with hospitality, entertainment, financial services, crafts etc.)

"Retail", an expanding concept
This integration of functions, along with the loss of certain business areas, makes it clear that the concept of "retail" is changing rapidly, and now covers much more than retail trade alone. In the near future education and health care will be among the areas in which the boundaries will become fluid.

Consumer trends and developments

Retail trade must adapt to the changing composition of the population, the rise in two-income households, demographic ageing, changing consumer attitudes etc. From now on, the customer and his expectations, desires, needs and dreams take centre stage.

Demographic change
Demographic ageing is among the more obvious changes. The target group of "seniors and mediors" have needs which are different from those of the young generation: more limited mobility, a different expenditure profile, and a host of opportunities in the travel, culture, leisure and games sectors.

Further, the number of persons per family is low: more than 50% of Brussels households are composed of a single person. The key is an essential change in the supply (smaller packages), and in the organisation of trade itself (adapting shop opening hours).

The customer insists on high quality...
... both in the products and in the shops themselves. The result is an intensification of competition.

There is a growing concern for security in commercial spaces.

The proximity principle
With increasing mobility, the proximity principle no longer applies systematically to non-routine purchases. On the one hand, the consumer has no need for a range of shops close to his place of residence; on the other, if such shops do not meet his needs, he will look for other places to shop.

Convenience
With the growing importance of time management, opportunities for rapid, efficient shopping are growing... as is the importance of finding a place to park easily.

Shopping, an event in itself
We live in an economy which thrives on events. It is more important to offer an event, which attracts the public, than the services themselves. There are more and more global formulae combining retail trade, hospitality, culture, public space and events. The purchase itself is no longer the main reason for the visit.

The shift from an economy of goods and services to one centred on the event requires a ceaseless rise in the quality concept, where the capacity to stand out is a function of originality. The marketing aspect of commercial centres or towns will become more and more important.

Rising prosperity with increasing leisure spending

We are witnessing an increase in well-being, leading to new demands centred on personal development; and at the same time, we are devoting an increasingly high proportion of our income to our leisure time.

It should be noted that households in Brussels spend less than those in the other two regions on food, drink, clothes, shoes, heating, lighting, maintaining their homes and gardens, private transport, financial services and insurance.

The search for well-being

The search for personal time is gaining ground. This trend cannot be ignored by the leisure, culture, sports and travel sectors, or by the personal care sector.

Other examples of consumer trends

The include home improvements, the search for friends sharing the same statuses, entertainment, events and sensations, spirituality and emancipation etc.

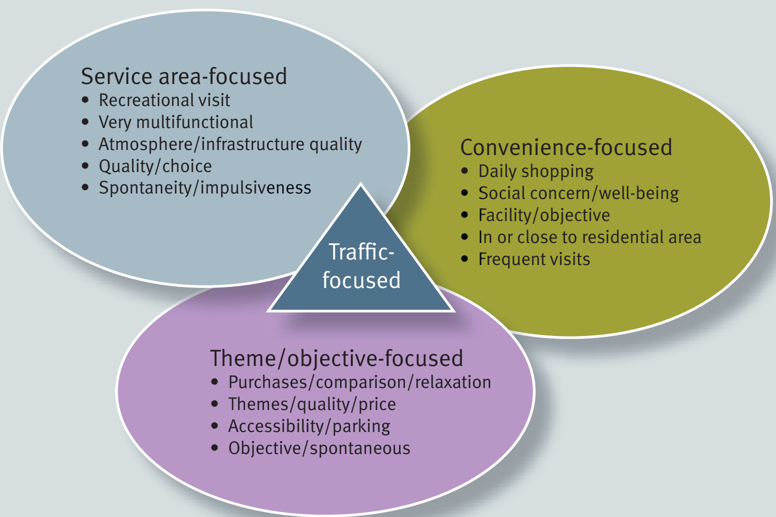
Reason for consumers' visits

The reasons for which consumers choose a shopping area are often multiple, but a main reason can generally be identified. Overall, these reasons fall into three categories:

1. *Comparative shopping and/or leisure shopping (restricted to one shopping zone):* purchases made with medium frequency, very personal, with significant emotional added value and great personal involvement.
2. *Proximity, convenience and comfort:* daily purchases are focused on necessities (both overlooked items and bulk purchases). The characteristics of this buying model centred on convenience are: very frequent, routine purchases, with little personal involvement.
3. *Objective-oriented shopping:* the efficient purchase of several articles at once; frequent routine bulk buying, in a one-stop shop (a shop in which everything can be bought at once), convenience, speed. But it may also be a matter of smaller semi-durable day-to-day purchases, and frequent routine purchases of low emotional value. Finally, this category also includes the objective-oriented preparation and purchase of major durable items.

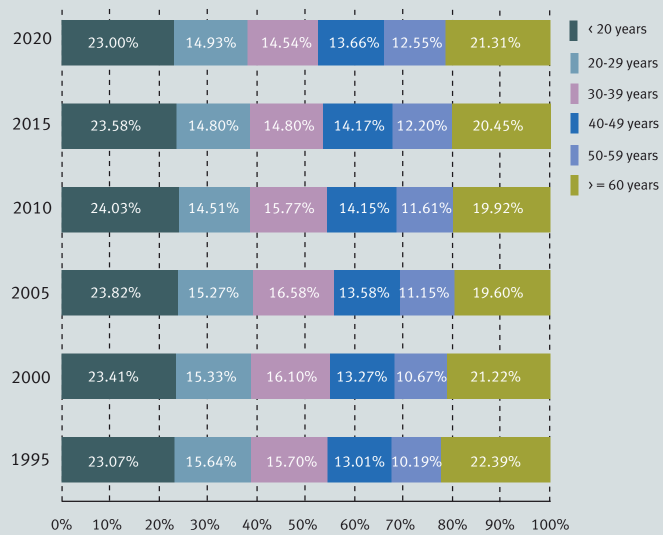
Town centres and the new urban commercial centres are often visited in a "service area" logic, while large retail infrastructures are more likely to be visited in a logic of "theme/objective". "Convenience" is likely to be the focus when visiting small centres and local shops. "Transit"-oriented shopping centres are situated close to railway stations, service stations, airports etc.

Main reasons for consumer visits



Source : Ecorys

Age pyramid in the Brussels-Capital Region population, 1995-2020



Source: NIS, IDEA Consult analysis

ANTICIPATED REGIONAL DEVELOPMENTS

Volume of demand

The total population of the Brussels-Capital Region will increase by around 30 000 over the next ten years. This will entail increasing demand for retail articles, and thus scope for additional trade.

Given the trend over the last 10 years, demand in Anderlecht, Ixelles, Jette, Koekelberg and Molenbeek will grow faster than the average for the Region (0.5% /year) while Watermael and Woluwé-St-Pierre will experience a slight fall in population

The age pyramid in the Brussels-Capital Region is stabilising, which suggests that expenditure will not fall through demographic change.

Income changes

No spectacular rise in average income is expected, and hence no dramatic rise in expenditure. Relative changes in income by neighbourhood are very limited, and projections differ little from the current model.

Expenditure model in retail trade

This should experience fairly consistent development, without any particular change at the municipal level.

Developments in the economic cycle

Changes in the economy are difficult to predict, but there was an upturn in 2005 and this upturn continued in 2006.

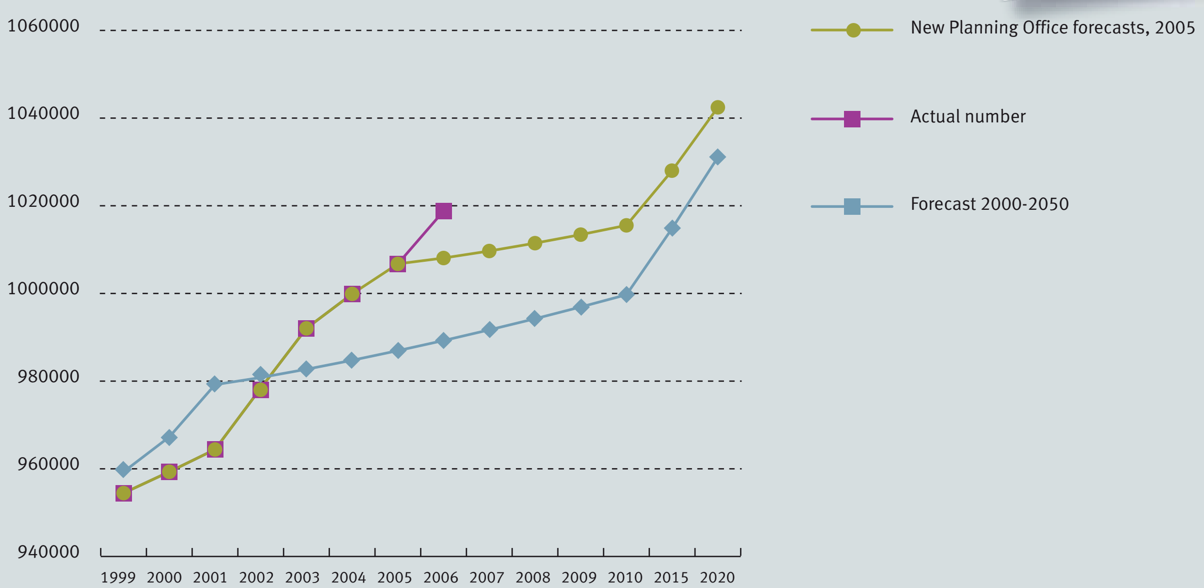
Ebb and flow of expenditure

The retail developments in the Flemish periphery around Brussels will obviously have an impact on the supply and demand in the Brussels-Capital Region. New large-scale developments are likely to reduce the opportunities for smaller-scale developments in the Region. As a result, purchasing power will move to the periphery. But the reverse could also occur if actual developments are carried out within the Brussels-Capital Region. Everything will therefore depend on political decisions.

Recreational shopping visits are mainly focused on the commercial nodes and (to a lesser extent) on large-scale complexes. Consumers have become very mobile, so that the popularity of a commercial centre is very likely to change over time.

Combined tourist visits (occasioning retail expenditure) are not really expected to increase in the absence of a genuine policy for improving the quality of commercial nodes.

Population of the Brussels-Capital Region 1999-2020



Source: Federal Planning Bureau, IDEA Consult analysis

Changes in the nature of demand

The nature of the demand for retail articles is partly linked to the ethnic composition of a town. Over the last ten years there has been a reduction in the African population, and a rise in numbers of eastern Europeans. The demand for traditional European articles is thus likely to increase.

But of course there remain differences between neighbourhoods: Berchem, Bruxelles, Ixelles, Etterbeek, Evere, Forest, Molenbeek and St-Gilles are experiencing a greater diminution in their non-European population than other municipalities. In the future there will be another shift between non-European and European foreigners, the result of immigration policy and the European rules on the free movement of persons within the EU.

Conclusions

These figures give an overall impression of the changes in demand which can be expected in the coming years.

What can we deduce from this? That the socio-economic development of the Brussels-Capital Region will certainly lead to a structural increase in retail expenditure over the next 15 years. It will be influenced by the supply policy and strategy operating within the Brussels-Capital Region.

IV CHANGES IN THE RETAIL TRADE STRUCTURE REFLECTING RECORDED TRENDS IN SUPPLY AND DEMAND

Changes in the structure of retail trade

Belgium is the European country with the highest number of shops: 3.6 /km^2. We are also at the top of the class for the available commercial surface per inhabitant. Flanders and Brussels have a network of fine grids that can be subdivided into for types of commercial zones:

- Town centres,
- Regional commercial centres,
- Outlying shops,
- Shops serving local areas.

Town centres had always been the main retail shopping centres until, during the 1960s, we witnessed the development of retail trade outside these centres, both because of the lack of space in the centres and because of the land prices there. First came the supermarkets and hypermarkets along the access routes, then other business joined them. The end of the 1960s saw the birth of the first shopping centres at the edges of towns, then even in the heart of the centres themselves, with a very detrimental impact on town centres because the offer was comparable and the environment attractive (covered, accessible, with car parking). Even the little shops typical of town centres were present!

Changes in retail demand in the Brussels-Capital Region

Change in the demand in consequence of...	**Impact on retail expenditure in the Brussels-capital Region**	**Impact in municipalities**
Demographic growth	↗	variable
Age pyramid	→	variable
Changes in incomes	→	variable
Models of expenditure	→	variable
Cyclical developments in the Belgian economy		heavy influence
Influence of the demand/ supply in the Flemish periphery	↗ → ↘	variable
Influence of the demand/ supply of recreational shopping visits	↗ → ↘	no influence
Influence of the demand for combined visits from abroad	→	no influence

Source: IDEA Consult

1. Reflecting the policy conducted in major retail commercial structures by Flemish Brabant / Flanders and by the Brussels-Capital Region.
2. Reflecting the policy for commercial nodes in the Brussels-Capital Region.

In 1975, to counter this trend and limit the adverse impact on town centres, new legislation was introduced to control commercial development. But because of the pressure linked to the need for housing on the outskirts, it still left sufficient opportunities for further development along access routes.

The shift is perceptible throughout Belgium: town centres are undergoing a distinct decline in their economic and residential roles. Vacant surfaces are rising. However, the authorities are taking a growing number of initiatives to restore life to the town centres. These include contracts signed with commercial nodes with a view to encouraging them.

Reflecting consumer motivation, the old hierarchical model is gradually being replaced by the network town, where the town centres and large concentrations are of more or less equal interest to the consumer. Town centres and outlying units are thus not in competition, but rather complement one another.

New types of offer

New types of retail trade, such as factory outlet centres, are also emerging. Shops on the periphery are also evolving towards a more concentrated form of offer.

Generally speaking, the addition of leisure facilities increases the attraction of centres, tending to prolong the length of the visit, and hence to increase consumption.

We are also witnessing an increase in sales at transit points: service stations, railways stations etc.

The InSites 2000 survey on Internet shopping suggests that around 70% of the turnover recorded through electronic trade is concentrated in the following 5 product categories:

› Travel, events and airline tickets (33%),
› Books and CDs (10%),
› Software (10%),
› Computer equipment (10%),
› Financial products (6.5%).

An increase in the Internet proportion of retail trade expenditure is expected, but it is not expected to become excessively high. Its influence on property is still limited.

REFERENCE CITIES

We examined two fairly comparable cities, Paris and Amsterdam, to study such aspects as the development of the retail trade hierarchy in terms of internal competition, complementarity and specialisation between the different retail nodes. We also looked at the shifts in terms of the supply and new supply technologies, and at the ways in which municipal authorities have managed this phenomenon.

1. Paris (and the Ile-de-France region): lessons for the Region

- The combination of a public law instrument, a management instrument and the necessary finance has made it possible to take rapid action in a whole series of districts.
- The perimeter must be managed with caution: the fact that departmental boundaries coincide with the orbital motorway has had unintended consequences for the development of hypermarkets.
- France operates a very broad definition of trade, including cinema and hospitality. It also pays very particular attention to craft trades.
- Paris has a number of positive examples of conjunctions between local development, commercial development and the reuse of historic infrastructure.

2. Amsterdam: lessons for Brussels

- Limiting the opportunities for development on the periphery has made it possible to avoid the erosion of the city centre, enabling the shopping areas to remain attractive to tourists and day trippers. The policy will be maintained in the future: large-scale projects such as regional commercial centres are explicitly excluded.
- Quality always takes precedence over quantity.
- The same trends are evident at the municipal and national level: expansion, creation of subsidiaries, specialisation etc. But expansion rarely occurs in the old districts.
- A structural plan and land use plans are the two important elements which enable Amsterdam to maintain its existing structure. Further, the commercial planning commission (“Commissie Winkelplanning”) plays a significant role in implementing the policy.

VI

OPPORTUNITIES AND RISKS FOR THE STRUCTURE OF RETAIL TRADE IN BRUSSELS

Outline of changes in retail demand in the the Brussels-Capital Region

	Opportunities	Risks
Policy	- Exchange of knowledge between the municipalities and/or traders' associations and/or TCM. - The Manifesto for dynamic trade in Brussels represents a step in the right direction for commercial strategy.	- Absence of an objective quantitative measurement tool to support policy. - Limited implementation measures in policy. - Limited number of tools. - Lack of overall vision of the retail trade in Brussels. - Limited vision of municipalities as regards retail trade. - Traders' associations dependent on the individual members. - Lack of match between the mobility plan and the functioning of retail trade.
Structure of the supply in the Brussels-Capital Region	- Opportunities for synergies between large and small shops. - The majority of nodes tend to have an identity, a specific focus. This trend should be developed in all commercial centres. - There are opportunities for international brands which are not familiar in Europe to locate in the BCR.	- Many low quality shops. - Weak identity of certain centres. - Over-supply. - Lack of professionalism in many shops. - Imbalance between the large and small-scale supply. - Limited attraction to the (inter)national consumer. - Absence of large-scale space in the centres. - Product mix is not in tune with consumer capacities. - It can be observed that the market radius of supra-local centres demonstrate a lack of attractiveness to the north of the BCR. - The relatively near presence of attractive centres (Mechelen, Leuven, Aalst). - Certain local centres are of low spatial quality.
Consumer behaviour in the Brussels-Capital Region	- The impact of Brussels residents shopping outside the Region is marginal. - Antwerp is the only centre which has positioned itself as a regional competitor.	- Sometimes we observe a dualisation of the customer base. Shopper profiles differ within a centre, making it difficult to create an identity in that centre. - A lack of supra-local attractiveness in the north of the Region.
Regional trends and developments	- Growing population, hence growing demand and opportunities for additional supply. - Many international brands are not yet present within the BCR. This gives potential for strengthening the attractiveness of some centres. - Brands are adapting to the trend towards larger shops and the lack of free space in which to develop city centre shops of greater size, accompanied by small shops on the periphery. - Specialisation in certain sectors of activity is good for trader identity and the identity of commercial centres. - The integration of different functions increases the attractiveness of a commercial area. - The trend of retail commerce to evolve towards leisure shopping is an opportunity for town centres with extensive leisure facilities. - New projects offer an opportunity to meet the need for experience. The demand for experience and distinction/added value means that consumers are prepared to travel further. - The international trends in new concepts offer the BCR an opportunity to position itself as an international commercial centre.	- The creation of branch subsidiaries can be a threat to the specialisation of some centres. - Space for large-scale shops on the periphery and the lack of space in the town centre can lead to competition between the town centre and the periphery. - Loss of sectors of activity can be a threat to the specialisation of centres. - Demographic ageing and shrinking households are trends in the BCR and these trends should be taken into account in commercial policy. - The customer insists on high quality in products as well as in the shops themselves. - The proximity principle no longer applies. There is greater mobility. If the level of the quality and the offer is not adequate, the commercial centre will lose customers. - No increase is expected in average income. This will consequently have no impact on retail trade.

PART II

Geomarketing survey

GEOMARKETING SURVEY METHODOLOGY

Socio-economic analysis

Socio-demographic analysis of the 30 minutes isochrone (30 minutes from the city centre)

This large area has a population of more than 2 100 000. Over the last 10 years there has been demographic growth of 3.7%, higher than the growth recorded in the Brussels-Capital Region or in Belgium.

Living standards are rather high, with an average household income slightly lower than the national average, but slightly higher than the Brussels-Capital Region average.

The most disadvantaged zones record regrettably high unemployment, while household size is also lower.

If we simply consider the dominant situation by statistical sector, town centres are mainly occupied by single people, whereas couples with or without children prefer to live on the outskirts

▶ see map 01 ▶ page 51
Population volume in iso30

Evolution of consumption

The total annual consumption of the average Belgian household rose by 4% in 2004 in comparison 2002, but it must be noted that these figures conceal considerable regional disparities. For example, in Brussels, total annual consumption fell by 1.5% between 2002 and 2004 (after rising 3.9% in 2002).

Population characteristics in the 30-minute isochrone and comparison with the Brussels-Capital Region

	30 minutes zone	Brussels-Capital Region	Belgium	30 minutes zone comparative index / Brussels-Capital Region	30 minute zone comparative index / Belgium
Population	2 146 337	1.006.749	10 445 852	/	/
Ten-year demographic evolution	3.7%	2.6%	3.1%		
Households	962 483	493 206	4 429 657	/	/
Average household size	2.23	2.04	2.36	1.093	0.945
‹ age 18	21.07%	21.33%	21%	0.988	1.003
18 - 64 years	62.39%	62.79%	62%	0.994	1.006
65 years +	16.54%	15.88%	17%	1.042	0.973
Average household income in €K	29.599	23.328	30.831	1.269	0.960
% job seekers	11.9%	18.2%	10.7%	0.652	1.108

source: NIS

Analysis of the commercial situation

An analysis of socio-economic permit application dossiers, together with a calculation of commercial density by municipality, will enable us to draw up a detailed portrait of the position of trade in the Brussels-Capital Region.

Socio-economic dossiers

The dossiers for socio-economic permit applications fall into six different categories:

- Supermarkets,
- Hypermarkets,
- Commercial complexes,
- Independent sales points,
- Garages,
- And other sales points.

There is an obvious trend towards the development of supermarkets and the assembly of sales points on a single site.

Between 2000 and 2004, the number of applications for the country rose to 1993. In Brussels, there were 46 applications; and in the iso30 zone, 250 applications of which 184 were accepted (= 292 842 m^2 of net commercial surface) and 66 were refused (= 154 774 m^2, or fully 34.5% of the surface applied for!).

▶ see map 02 ▶ page 52
Dossiers examined by the Economic and Social Council for Distribution between 2000 and 2004 in the 30 minute isochrone

If we break these dossiers down by municipality, the greatest pressure is exercised on Anderlecht, Zaventem, Wavre and Sint-Pieters-Leeuw.

In terms of towns where new brand names or new concepts are being established, Antwerp appears the most attractive, followed by Brussels Town with the Louise area and the Rue Neuve.

Commercial density by municipality

For the purposes of this calculation, account was taken of all the food superstores and around 30 retail chains (the result is an underestimate, but representative).

En Belgium:
average of 618 m^2 commerce/1000 inhabitants
In Flanders:
average of 495 m^2 commerce/1000 inhabitants
In Wallonia:
average of 880 m^2 commerce/thousand inhabitants
(but with significant disparities between provinces)
In the Brussels-Capital Region:
average of 476 m^2 commerce/1000 inhabitants
In the iso30:
average of 540 m^2 commerce/thousand inhabitants
(ranging from 32 m^2 in Lasne to 6 636 m^2 in Drogenbos).

Available market potential for food superstores

The "available market potential" (MPo) is the difference between the total available market and the market already occupied by food superstores present in the municipalities. This indicator (expressed in € millions) represents the turnover a new supermarket would have if households in the municipality only purchased within the municipality, assuming that households from other municipalities did not shop there, and if the real market corresponded to the absorbed market potential.

We were able to identify the municipalities where there is still a significant market potential. Where the MPo is positive, this means that there is an inadequate supply to meet the demand, and thus a significant displacement of trade. A negative MPo, however, indicates saturation, such that the offer is in surplus and competition is highly developed. In these cases food superstores will exploit the market in neighbouring municipalities.

In our analysis, the MPo was positive for the Brussels, Leuven, Mechelen, Aalst and Dilbeek municipal areas. This can be explained by the significant volume of population offering potential customers, and the increasing trend for commercial activities to move to the periphery.

Alongside these, there were municipalities with a markedly negative MPo, with an offer in surplus in relation to the demand (Kraainem, Drogenbos).

Market excluding food superstores

The equivalent calculation for the market excluding food superstores is unfortunately impossible to carry out, as the exact commercial surface per municipality is unknown.

Furthermore, since productivity varies a good deal depending on the type of trade, an average would not be representative.

Conclusion

From this survey of the socio-economic situation in the iso30 and of the commercial situation and supply-side behaviour in the same zone, it can be seen that the heart of the Brussels-Capital Region is less well-placed than its periphery:

- Its inhabitants are poorer.
- The unemployment rate is rather high.
- There is a higher proportion of single people.
- A majority of elderly persons live in the North West municipalities.
- Consumption fell between 2002 and 2004, and is now lower than that of Flanders and Wallonia.

Methodology

The geo-marketing survey which preceded the drafting of this Commercial Development Perspective for Brussels placed the emphasis on an analysis of several commercial nodes at different hierarchical levels, distributed in a balanced fashion across the territory of the Brussels-Capital Region. The consultants responsible carried out two survey waves, and as well as fieldwork to assess commercial supply and the degree of attraction.

First survey wave

A first survey wave concentrated on the Woluwé Shopping Centre, the Westland Shopping Centre, and the Louise and Toison d'Or / Porte de Namur centres, as well as on the Rue Neuve-City2 district.
It considered:

› The behaviour patterns of regular customers (frequency and reasons for frequenting the area, the shops visited, the main distributors within the Centre),
› Competing centres for superstore food purchases, local purchases, leisure and other purchases (identifying competing centres, the shops visited, reasons and frequency),
› Customer profile: age, occupation, level of education, household composition and size, means of transport used and locality by postcode.

The under-representation of certain municipalities in the Brussels-Capital Region may be due to

› Commercial displacement from the Brussels-Capital Region,
› Local consumption in supplementary or intermediate commercial nodes,
› Consumption in specialised centres better meeting consumer expectations as compared with traditional commercial centres.

The survey results are in part confidential: they have sometimes been carried out outside the public domain (for example in shopping centres and galleries), and the owners who have authorised them retain exclusive rights to the results and the analyses.

Second survey wave

In order to analyse better the conduct of regular customers in municipalities which were under-represented in the first survey, a second wave focused on:

› The Basilix Shopping Centre in Berchem-Ste-Agathe,
› The De Wand area and Rue Marie-Christine in Laeken,
› Miroir in Jette,
› Uccle centre and Fort Jaco in Uccle,
› Helmet in Schaerbeek.

Once again, the survey addressed:

› The conduct of regular customers,
› Competing centres,
› Customer profiles.

ANALYSIS OF THE FIVE MAIN REGIONAL CENTRES OF ATTRACTION

Analysis of the commercial offer

All the buildings used for commercial purposes have been classified into 10 categories:

› Vacant cells,
› Household goods,
› Personal goods,
› Food superstores,
› Hotels and catering,
› Leisure,
› Commercial services,
› Hygiene, beauty and health,
› Groceries,
› Fuel and transport equipment.

▶ see map 03 ▶ page 53
Commercial mix of the five regional centres

The presence of vacant cells enables us to create an indicator for the condition of each commercial node: the commercial vacancy rate. If it is below 5%, this may be described as characteristic of a dynamic node with a turnover of businesses. A rate above 5% diminishes the commercial offer, breaks the continuum and introduces a feeling of insecurity.

The researchers considered the location, accessibility by car and public transport, and nearby car parks for each centre.

Quantitative results (not indicative of quality):

› Woluwé Shopping Centre: 0 defect,
› Westland Shopping Centre: poor public transport access: no bus line linking to centre of town,
› Louise: spatial layout rather unappealing, little street parking, private car parks inadequately signposted,
› Porte de Namur:
  - Chaussée d'Ixelles: impoverished commercial offer between Rue du Prince Royal and Place Fernand Cocq,
  - Galeries de la Toison d'Or: commercial vacancy rate of 31%.
› Av. Toison d'Or: 0 defect at time of survey.
› Rue Neuve & City2: Plenty of private car parks, but expensive; problems with on-street parking.

Effective trading zone

The survey question regarding the provenance of customers is obviously crucial: it enables us to define the effective trading zone (to be weighted by the frequency of shoppers' visits).

These effective trading zones have not been compared to their potential trading area, less extensive because of the presence of large numbers of commuters.

Woluwé Shopping Centre

The customer base is focused on a north-south axis extending from the shopping centre. The closest municipal areas (WSL, WSP, Kraainem and Wezembeek-Oppem) recorded the strongest level of penetration, followed by a group of municipalities around the latter. Beyond this, the attraction and the numbers both reduce.

The effective trading zone is segmented into primary and secondary zones.

The residual zone, which covers casual shoppers, cannot be defined.

The primary zone:

- This extends along a north-south axis the length of the West Ring, the presence towards the West reaching a boundary with the town centre.
- It is in this zone that the attraction and loyalty are highest, with 60% of shoppers, visiting on average three times a month.
- There is a population of 308 280 potential customers.

The secondary zone:

- Accounts for 29.3% of shoppers visiting once or twice a month.
- There is a population of 1 149 650 potential customers, taking all the municipal areas of the Brussels-Capital Region together, to which can be added Leuven to the east and Wavre and Braine-l'Alleud to the south.

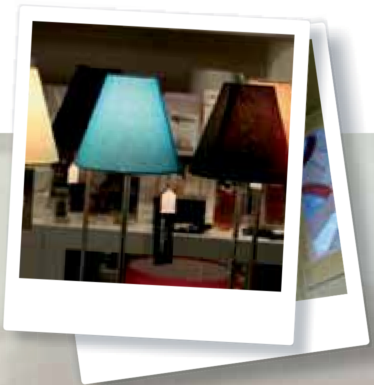
The residual zone:

- Accounts for the 11.2% of remaining shoppers, visiting a little less than once a month. These are casual shoppers, often commuters. The areas most represented are Hannut and Jodoigne.

Conclusion:

- The Woluwé Shopping Centre's trading zone thus extends to cover a population of 1 458 000. It principally covers the east of the Brussels-Capital Region.
- The age structure is the same as for the Brussels-Capital Region (with a slight over-representation of older people in the primary zone, and under-representation in the secondary zone).
- The standard of living of the population is higher than that of the Brussels-Capital Region as a whole, particularly in the primary zone.

▶ see map 04 ▶ page 54
Standard of living in the effective market radius of the Woluwé Shopping Centre



Westland Shopping Centre

In this case there is a much greater concentration of customers close to the shopping centre: Anderlecht and Molenbeek alone account for 50% of customers in the Westland Shopping Centre. Next come shoppers from outside the Brussels-Capital Region, including 7% from Dilbeek.

The primary zone:

- Extends towards the southwest, limited to the north by the R20 and the E40 motorway and to the east by the town centre and the N6.
- Accounts for 61% of shoppers visiting more often than once a week.
- Represents 270 317 potential customers.

The secondary zone:

- Extends along a northeast southwest axis, from Vilvorde to Enghien (competition is limited in these directions), structured along national roads and motorways. It extends eastwards across the whole Brussels-Capital Region, despite the city centre and the Woluwé Shopping Centre.
- 30% of shoppers visit the shopping centre once a fortnight.
- There are 1 062 778 potential customers.

The residual zone:

- Accounts for the remaining 9% of shoppers, who visit around once a month.

Conclusion:

- The trading zone covers a population of 1 334 000 with an age structure comparable to that of the Brussels-Capital Region (including a slight over-representation of young people in the primary zone and under-representation of older people in the secondary zone).
- The standard of living of the population is higher than that of the Brussels-Capital Region (even more so in the secondary zone) but lower than that of Belgium as a whole.

▸ see map 05 ▸ page 55
Standard of living in the effective market radius of the Westland Shopping Centre

Louise centre

Customers mainly come from the Brussels-Capital Region.

In the primary zone:

- 66% of regular customers visit the area twice a month, and represent a potential of 654 911 inhabitants.
- The zone includes the municipalities in the south of the Region, extending northwards as far as Laeken.

The secondary zone:

- Is shaped like a triangle with the apex at Grimbergen, and the base running from Wavre to Tubize via Braine-l'Alleud.
- Mainly attracts the population living in the south of the Brussels-Capital Region.
- Accounts for 20 % of regular shoppers, and offers a customer potential of 790 071 inhabitants.
- Visiting rate is once or twice a month.

The residual zone

- Accounts for the 14.7 % of shoppers visiting less than once a month.

Conclusion:

- The trading zone reaches a population of 1 445 000.
- The age structure differs from that of the Brussels-Capital Region: 18 to 64s are over-represented, and the over 65s are under-represented.
- The standard of living is higher than that of the Brussels-Capital Region, and in the secondary zone it is above the national average.

▸ see map 06 ▸ page 56
Standard of living in the effective market radius of the Louise centre

Porte de Namur – Toison d'Or centre

Here, shoppers mainly come from the Brussels-Capital Region. The Schaerbeek municipality, despite its relative distance, is well represented.

The primary zone:

- Provides 62 % of regular shoppers.
- They visit the site more than once a fortnight.
- The customer potential is 556 536 inhabitants.
- Includes locations in the south and centre of the Brussels-Capital Region (BXL, Schaerbeek and St-Josse).

The secondary zone:

- Represents 24 % of shoppers.
- Visiting the centre at once or twice a month.
- The customer potential is 678 856 inhabitants.
- The configuration lies on a north-south axis: accessibility is good in these directions.
- It should be noted that in the south customers come essentially from Wallonia. No customers come from Flemish Brabant.

The residual zone:

- Provides a further 14 % of shoppers.
- Visiting more than once a month.

Conclusion:

- The trading zone reaches a total population of 1 250 000.
- The age structure is similar to that of the Brussels-Capital Region as a whole: under 18s and over 65s are under-represented, 18-64s are over-represented in the primary zone.
- The standard of living is higher than that of the population of the Brussels-Capital Region, and even higher in the secondary zone.

▸ see map 07 ▸ page 57
Standard of living in the effective market radius of the Porte de Namur

Rue Neuve – City2 centre

73% of shoppers come from the Brussels-Capital Region, with central locations prominent (Brussels, Schaerbeek, Haren and St-Josse).

The primary zone:

- Accounts for 71 % of shoppers, visiting more than once a fortnight.
- A population of 895 758 forms the potential customer base.
- Customers come from all directions and all municipalities. This is explained by the fact that the centre is very accessible.

The secondary zone:

- Accounts for 15 % of shoppers once or twice a month.
- A population of 829 293 forms the potential customer base.
- Customers come from all directions, expanding outwards towards the southwest along the N6 (Halle, Tubize, Soignies).

The residual zone:

- Accounts for the remaining 13.6 % of shoppers.
- Visiting the centre more than once a month.

Conclusion:

- The trading area reaches a total population of 1 725 000.
- It has experienced demographic growth of 4.02 % over the last 10 years, particularly pronounced in the secondary zone.
- The age structure is the same as in the Brussels-Capital Region: 18-65s are over-represented in the primary zone, and over 65s are under-represented.
- The standard of living is lower than that of the population of Belgium generally, except in the secondary zone rate is much higher.

▶ see map 08 ▶ page 58
Standard of living in the effective market radius of the Rue Neuve – City 2 centre

Summary

The centres analysed may be classified in three categories:

- The Westland and Woluwé shopping centres have a fan-shaped trading zone, opening towards the exterior of the Brussels-Capital Region.
- The Rue Neuve–City2 Centre has a trading zone which is typical of a hyper-centre zone, extending in all directions.
- The Louise and Porte de Namur centres have a limited trading zone which resembles those of traditional urban districts.

Comparative analysis of the customer base

Socio-demographic profile of the customer base

Customer surveys have enabled us to draw up customer profiles using comparisons with socio-demographic statistics.

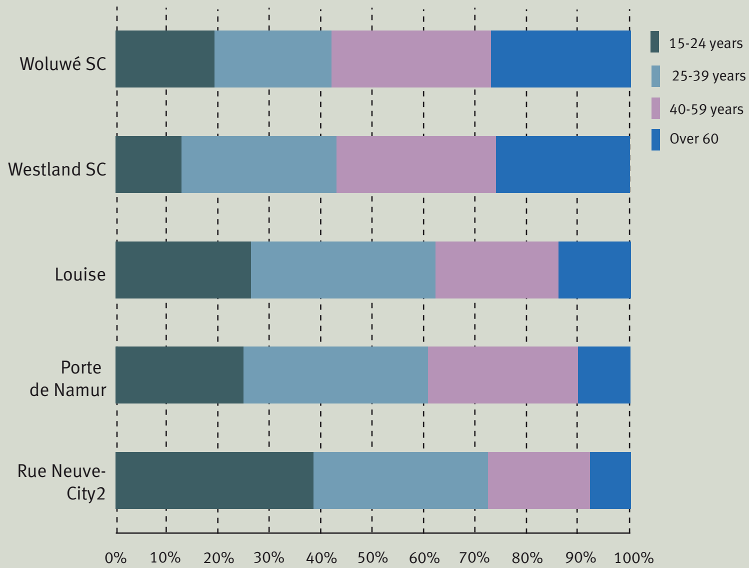
Customer age

Three types of customer base have been identified in terms of the age profile:

- The Woluwé and Westland shopping centres attract people over the age of 65.
- The Louise and Porte de Namur centres have a younger customer base than the shopping centres.
- The hyper-centre is characterised by an over-representation of young people, which may deter the elderly.

This confirms the differing operating modes of these three types of centres.

Profile of customers using the five regional centres



We still do not know whether this over- or under-representation reflects the structure of the population, or is due to the fact that shopping areas attract more customers from certain age groups.

Age brackets: 15-24s, 25-39s, 40-59s and the 60s +.

Woluwé Shopping Centre

Certain age brackets are therefore more or less represented among actual customers than in the effective trading zone.

› The 15-24s are over-represented.
› The 25-39s are under-represented.
› The over 60s are slightly over-represented.

Westland Shopping Centre

There is a non-significant difference between representation by age bracket in the shopping centre and in the effective trading zone.

Louise

› The 15-24s are over-represented.
› The other two categories are under-represented.

Porte de Namur

› The 15-24s are over-represented.
› The over 60s are under-represented.

Shops here attract a youthful customer base.

Rue Neuve – City2

› The 15-24s are greatly over-represented.
› The 25-39s are slightly over-represented.
› The 40-59s are slightly under-represented.
› The over 60s are greatly under-represented.

Here the offer targets a young to very young customer base, and the appeal to older customers doubtless suffers from mobility problems and a latent sense of insecurity.

Household composition and size

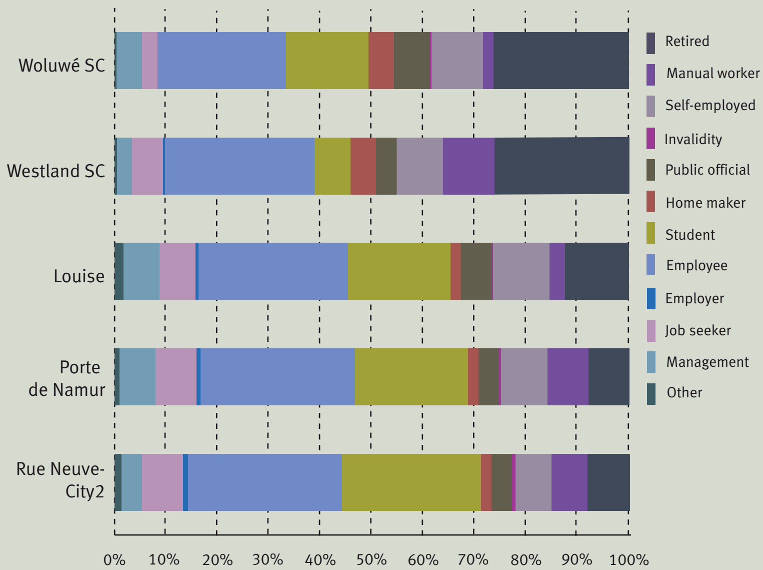
The Woluwé and Westland shopping centres are mainly frequented by couples with or without children.
In the three urban centres, there are almost as many single people as there are couples with or without children.
At Woluwé, single women are aged 15-24 or are over 60.
At Porte de Namur, couples with or without children aged between 40-59 are over-represented.

Target socio-economic profile of the customer

Status was approached using two variables: socio-professional category, and the level of education.

Employees are the most represented everywhere, followed by students in the three urban centres, and retired people in the shopping centres. Woluwé has a more diversified profile than the other centres.

Socio-professional categories



In the Louise, Porte de Namur and Woluwé centres, university graduates are in the majority. At the Westland Shopping Centre, those with a certificate of secondary education predominate, as in the Rue Neuve-City2 centre.

The status of shoppers is generally rather high in the Louise centre, average to high at Porte de Namur and Woluwé, and average to low at Westland and the Rue Neuve.

Frequency and reasons for visits

With the exception of the Westland Shopping Centre, visits are rather infrequent: the proportion of shoppers visiting the centre once or more per week is low, while the number of occasional visits is high.

The main reason for visiting this centre is its proximity to the place of residence. At Woluwé and at the Westland SC, the food shops, the lively atmosphere and the range of shopping were the other arguments advanced. At Louise and Porte de Namur, the main reason was proximity to the place of work/study, and the commercial offer. At City2, shoppers mentioned proximity to home or workplace, and the commercial offer.

It is thus evident that the presence of offices and colleges close by plays an important role in the frequency with which these urban centres are visited.

Whether accompanied, and point of departure

Shoppers tend to come alone to the town centres, and to be accompanied in the shopping centres. They come directly from home (particularly to shopping centres), from work (slightly more in the three other urban centres), and from leisure activities (particularly to the Woluwé Shopping Centre).

Means of transport used

The Woluwé & Westland SC are mainly reached by car (even where home is close by), then by public transport, and finally on foot.

Very frequent public transport lines play an important role. Those using public transport are younger, and at a lower socio-economic level (students, job seekers; fewer are in managerial jobs or self employed) than those who come by car.

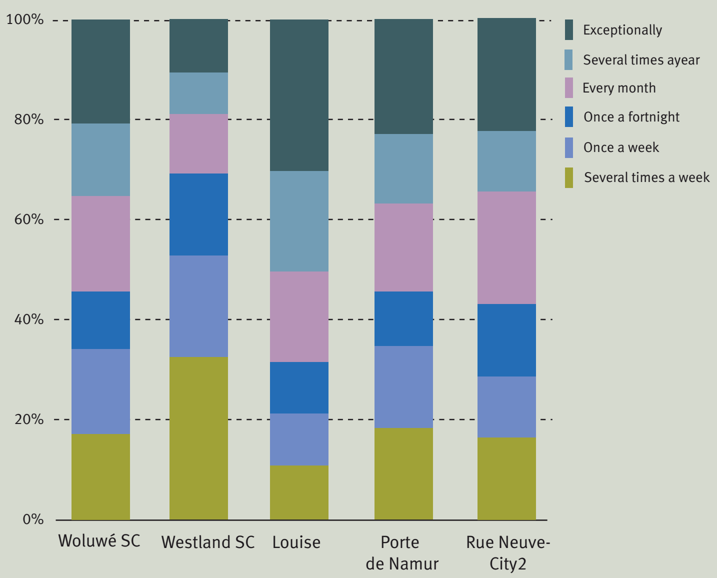
It is vital to improve intermodal accessibility in order to attract customers with different profiles.

Summary

Woluwé Shopping Centre

- Shoppers here are older than in the average shopping centre.
- They are either couples, with or without children, or single women. Their status is in general average to high.
- The centre is visited less frequently than the average shopping centre.
- It is chosen because of its proximity to home and for its pleasant atmosphere.
- Shoppers come from home or from work, by car or using the Metro.

Frequency of visits to regional centres



Westland Shopping Centre

- Shoppers here are older than in the average commercial centre. They are couples with or without children, and their status is average to low.
- The Westland SC is visited as frequently as the average commercial centre.
- It is chosen because of its proximity to home and for its pleasant atmosphere.
- Shoppers come from home or from work, mainly by car, a few by bus.

Louise

- The age profile of shoppers is similar to that of the town centre shopping areas: young.
- Shoppers come from households with or without children, or are single and of high status.
- The frequency of visits is rather low in comparison with an average town-centre commercial area.
- Shoppers choose this area because they work or study close by.
- They come from home or from work, by public transport (Metro followed by tram).

Porte de Namur

- The age profile is the same as for the Louise Centre: young.
- They come from households with or without children, or are single.
- They are of average to high status.
- They come here because they work or study close by,
- They come from home or from work, by public transport (Metro or bus).
- The frequency of visits is slightly lower than the average for a town-centre commercial centre.

Rue Neuve-City2

- The public here mainly consists of young people living in households with or without children, or single people.
- They are of average to low status.
- They come here because they live or work/study close by.
- They mainly come from home or from work using public transport (Metro).

Shoppers' suggestions

An open question addressed the opinions of customers regarding the shops which were lacking in the shopping centres (note: there may be some problems of familiarity in respect of certain brand-names which are recent to Belgium and have not yet been accepted as meeting needs).

Woluwé SC: pharmacy, interior decoration shops at more of an entry-level than those existing, FNAC, clothes shops appealing to the young, including men's clothing.

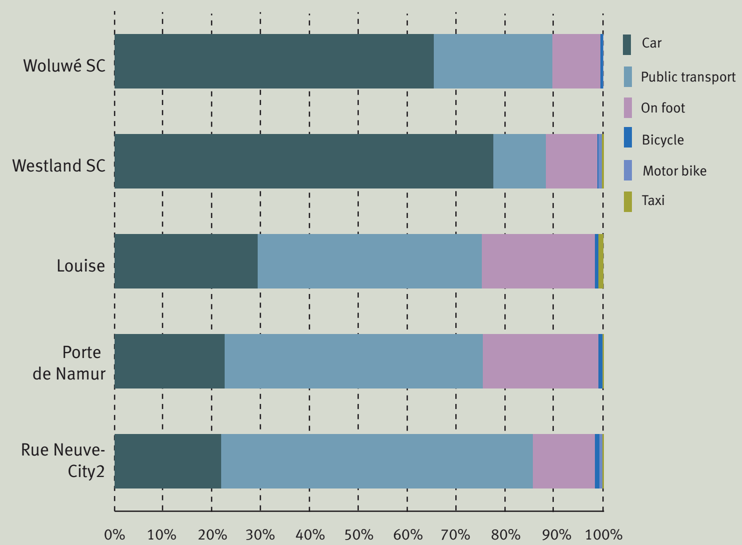
Westland SC: pharmacy, Inno, clothes shops, DIY (mentioned by the over 60s).

Louise: H&M and cheaper stores, sports goods, books and music, hotels and catering, food superstore.

Porte de Namur: Zara, bookshop, food superstore.

Rue Neuve – City2: Shoppers are in general satisfied with the range of shops on offer (even when they also habitually visit another centre). They would like more upmarket shops (revealing the loss of quality in this centre), shoes, and food.

Means of transport used



Summary

Two main factors for the attraction of centres have been considered here: the commercial offer, and accessibility.

Positioning of the different regional centres, and the challenges

The commercial mix in the two shopping centres is broadly comparable (dominated by personal goods), but of different status (more upmarket at Woluwé than at Westland).

The majority of the brand names present at the Louise centre (personal goods, upmarket) cannot be found elsewhere.

The Rue Neuve - City2 and the Porte de Namur are home to many national and international brand names selling personal goods, somewhat more down market than the others, typical of town centre high streets with a very standardised range.

There are no vacant cells except in the Galeries de la Toison d'Or. However it should be noted that on the Rue Neuve and the Chaussée d'Ixelles, new shops are of average quality, which is experienced by shoppers as a fall in quality.

The dualisation of the customer base can be observed at the Louise and Porte de Namur areas, and in the Woluwé Shopping Centre: the commercial offer being of inconsistent quality, customers come for one or two brand names and do not visit the other shops present.
By contrast, shoppers present a similar profile at Westland and Rue Neuve – City2.

The upper town currently stands at a crossroads in its development

› Either the special features of the Louise Centre will be strengthened, and the "Entre les deux portes" project will be able to attract brand names of the same status – but shoppers will not necessarily move into the neighbouring Porte de Namur centre.
› Or, under the pressure of shoppers and young people, more entry-level brands will establish themselves on the Avenue Louise. This would lead to a more ordinary range of shopping which would impoverish it, increasing neither the critical mass of shoppers nor the trading zone, but strengthening competition in relation to other regional centres.
› Or the "Entre les deux portes" project will choose to distinguish itself from the two neighbouring centres, creating its own image with customers.
› NOTE: there is a demand for food superstores in the Louise and Porte de Namur centres, but we may question the desirability of meeting this demand, since the already significant traffic levels would only rise, and customers of food superstores do not generally visit the surrounding shops.

It should also be noted that the trading zone for centres in the Brussels region as a whole demonstrates a lack of attraction in the Brussels-Capital Region to the north.

Shopping centres which are "driving engines" in the east and west

Their position at the boundary of the Region stimulates the supra-regional attractiveness of the Brussels-Capital Region to the east and the west.

Accessibility as a determining factor for attractiveness

› The shopping zones extend along the main through routes.
› The physical and natural barriers which structure the Brussels landscape (railways, canal, the Soignes Forest and the Bois de la Cambre) act as obstacles to access. The shopping zones thus resemble clearly defined quadrants, like slices of a pie.

The Rue Neuve – City2 is an exception, because of its central position, accessible from all sides.

The importance of the public transport network and accessibility by car

It is thus clear that accessibility by car and the provision of parking (number of spaces, parking charges and visibility) may be a lever to increase the super-regional attractiveness of these centres.

The presence of a high frequency Metro, tram or bus service may considerably increase the modal split of public transport: town centre shopping districts are frequented more often by public transport than the outlying centres.

Nevertheless, the user profiles for the two forms of transport are very different:

› Younger, and of a lower social level for public transport,
› Older and in higher social classes for transport by car.

We may conclude that the mobility policy of regional centres may directly influence customer profile and the supra-regional attractiveness of the centre.

Role of service activities and commuters in the commercial dynamic

20% of the persons interviewed gave the proximity of their workplace as a reason for their visit.

We should note in passing that this proportion increases for residents outside the Brussels-Capital Region (except for the Westland SC, which is not much affected by this phenomenon).

The growth in the supply of office space close to the main shopping centres, and the synergies between businesses and traders, may strengthen purchasing in the regional centres and thus pick up part of the wealth produced in the Brussels-Capital Region.

Absence of regional centres to the north and south of the Region

We observed:

› The absence of centres to the north and south of Brussels,
› The weaker penetration of centres in the north west and south west of the Brussels-Capital Region.

The reasons:

› Access difficulties,
› The isolation of various districts in the north zone,
› The presence of large unpopulated areas (railway, Laeken Park, Heysel, Bois de la Cambre and the Soignes Forest etc) which surround the Brussels-Capital Region and reduce the customer potential of the primary zone for a potential regional centre to the north and to the south of the Region.

Car journeys by shopper provenance

	Brussels Capital Region	Outside Brussel Capital Region
Woluwé Shopping Centre	63.8 %	85.3 %
Westland Shopping Centre	67.9 %	93.7 %
Louise	23.4 %	48.2 %
Porte de Namur	19.7 %	34.4 %
Rue Neuve – City2	18.9 %	30.0 %

Public transport journeys by shopper provenance

	Brussels Capital Region	Outside Brussel Capital Region
Woluwé Shopping Centre	21.4 %	10.8 %
Westland Shopping Centre	14.7 %	3.8 %
Louise	47.3 %	40.8 %
Porte de Namur	53.9 %	47.4 %
Rue Neuve – City2	65.6 %	58.4 %

Reasons for frequenting a shopping centre proximity to work place (except students)

	Brussels Capital Region	Outside Brussel Capital Region
Woluwé Shopping Centre	11.0 %	20.2 %
Westland Shopping Centre	7.6 %	10.0 %
Louise	21.7 %	48.7 %
Porte de Namur	22.5 %	51.1 %
Rue neuve – City2	21.9 %	30.6 %

Work as place of origin before arriving in a shopping centre

	Brussels Capital Region	Outside Brussel Capital Region
Woluwé Shopping Centre	15.5 %	21.8 %
Westland Shopping Centre	14.9 %	15.4 %
Louise	23.4 %	29.9 %
Porte de Namur	18.5 %	38.3 %
Rue Neuve - City2	20.9 %	26.3 %

IN-DEPTH SURVEY OF THE NORTH-EAST ZONE

During the first survey wave in the 5 main regional centres of attraction, it became clear that shoppers from certain parts of the north-west and south-west of the Region were under-represented.

To analyse their purchasing habits, a second survey wave was carried out in 5 centres in these areas:

› The Basilix Shopping Centre in Berchem-Ste-Agathe,
› Miroir in Jette,
› De Wand in Laeken,
› Uccle centre and Fort Jaco in Uccle,

which all offer a significant range of shopping and play a supra-local role.

The analysis will be supplemented with data on the commercial nodes at Helmet (Schaerbeek) and Marie-Christine (Laeken).

Analysis of the commercial offer

Basilix Shopping Centre

Located in Berchem-Ste-Agathe, along the Boulevard Charles-Quint, the Basilix offers 64 shops over 2 floors.
It was renovated in 2004.

› It has a free car park, shared with a retail warehouse which includes a Carrefour hypermarket.
› The commercial mix is dominated by mid-range personal goods and, to a lesser extent, household goods. The rest of the mix is fairly balanced, with two major "driving engines": Delhaize and Media Markt (but note that one shopper in five visiting the Media Markt does not enter any of the other shops at the centre). Food, hygiene, beauty and health, and commercial services, are under-represented. The brand names present are nationally or internationally recognised, but there are no genuinely attractive brand names enabling it to complete with the two other shopping centres.

Miroir

Located in Jette, around the Place Reine Astrid and neighbouring streets.

› The commercial mix is balanced: hospitality, commercial services, hygiene, beauty and health, food superstore, and personal goods a little less represented than elsewhere. The majority of brands are average to low range, and offer convenience products. There are no genuine brand leaders here to attract large numbers of shoppers. Though the visiting rate is high, the proportion of shoppers from outside the Brussels-Capital Region is very small.
› Accessibility: the centre is rapidly accessed from the inner ring and the west ring. It has a convenient (paying) car park, and is served by bus and tram lines to the metro and thence the town centre.
› The commercial vacancy rate is lower than the turnover rate.

De Wand

Situated in the North of the Brussels-Capital Region, in Laeken.

› The commercial mix: it has a low proportion of shops selling personal goods, which very few attractive brands. Hospitality, hygiene, beauty and health and commercial services yield similar results. La Poste and two food superstores play a (relative) role as "driving engines". The status of this centre is average.
› Accessibility: it is linked almost directly to the west ring, but is isolated from the rest of the Brussels-Capital Region by the A12, the Laeken Royal Park and the Willebroeck canal. It has no direct public transport link to the town centre. Its focus appears rather towards the North and Vilvorde.
› Squeezed in between the centre of Vilvorde, the Marie-Christine centre and the centre of the city, it would not be possible to develop its attractiveness. The vacancy rate of more than 8% bears witness to these difficulties.

Comparative analysis of the commercial mix of the two latter centres

› The commercial mix of these centres is similar to that of small town centres:
  - At De Wand: more hospitality than average, fewer household and personal goods,
  - At Miroir: more hospitality, household goods and food, fewer personal goods.
› They operate essentially around food superstores.
› They are more like intermediate centres, in a lower category than the Basilix centre in the hierarchy of commercial centres.

▶ see map 09 ▶ page 59
Commercial mix of Basilix SC, Miroir and De Wand centres

The effective trading zone

Basilix Shopping Centre

The critical mass of the Basilix centre is inadequate to a very extensive trading area: most shoppers come from areas to the east of the ring.

Primary zone:

- Comprises 68% of shoppers using the Shopping Centre, or 338 shoppers.
- Average frequency of visits is high: once or twice a fortnight.
- The customer potential is 200 000 inhabitants.
- The age structure differs from that of the Brussels-Capital Region or of Belgium: it is structured along the communication routes leading to the commercial centre from either side of the west ring and the Avenue Charles Quint.

Secondary zone:

- Comprises 18% of shoppers using the centre.
- The frequency of visits is less high: once a fortnight.
- The customer potential is 250 000 inhabitants.
- The zone extends towards the north-west and Flemish Brabant (and is limited towards the south by the city centre).

Residual zone:

- Cannot be geographical defined,
- Comprises the remaining 14% of shoppers visiting the centre around once a month.

The total trading zone has a potential of 450 000 inhabitants, with

- Over-representation of the under 18s,
- Over-representation of elderly people in the primary zone,
- Under-representation of elderly people in the secondary zone,
- Under-representation of the working population in both zones.

The standard of living of the population is fairly high: below the national average, but higher than the Brussels-Capital Region.

Population characteristics in the trading area (Basilix Shopping Centre) and comparison with the Brussels-Capital Region and Belgium

	Market radius	Brussels-Capital Region	Belgium	10 minute zone comparative index / Brussels-Capital Region	10 minute zone comparative index / Belgium
Population	447 682	1 006 749	10 445 852	/	/
Ten-year demographic evolution	4.6 %	2.6 %	3.1 %		
‹ 18 years	22.53 %	21.33 %	21 %	1.056	1.073
18 - 64 years	60.1 %	62.79 %	62 %	0.957	0.969
65 years +	17.38 %	15.88 %	17 %	1.094	1.022
Average household income in €k	27.331	23.328	30.831	1.172	0.886
% job seekers	15.9 %	18.2 %	10.7 %	0.872	1.484

Miroir

Not surprisingly, shoppers mainly come from nearby areas.

Primary zone:
- Accounts for 75% of shoppers in the shopping centre, or 400 shoppers.
- High frequency of visits: once or twice per week.
- The customer potential is 61 583 inhabitants.
- There is a concentration of customers from the locality: the primary zone (bounded to the south by the Avenue Charles Quint, to the north west by the west ring, and to the east by the railway) includes just two small locations, Jette and Ganshoren.

Secondary zone:
- Accounts for 17% of shoppers.
- Visit frequency: once or twice a fortnight.
- The customer potential is 265 831 inhabitants.
- The configuration lies on a north-west south-west axis, from Laeken to Anderlecht.
- Isolated in the Wemmel direction, the zone does not cross the boundary of the Brussels-Capital Region.

Residual zone:
- Accounts for the remaining 7% of shoppers at this centre.
- Visiting a little more often than once a fortnight.

The total trading area has a potential of 330 000 inhabitants. The age structure differs from that of the Brussels-Capital Region: in the primary zone, we observe under-representation of young and working people, and over-representation of the elderly.
In the secondary zone, however, there is over-representation of young people, and under-representation of working and older people.
The standard of living is generally below that of the Brussels-Capital Region, particularly in the secondary zone.

De Wand

The Laeken district accounts for almost 50% of the shoppers using this centre. The majority of the remaining shoppers come from outside the Brussels-Capital Region, with a greater attraction towards the north.

Primary zone:
- Accounts for 63% of shoppers in the SC, or 280 shoppers.
- High frequency of visits: 1 or 2 times per week.
- The customer potential is 133 928 inhabitants.
- The zone is situated along the rapid access A12, bounded to the north by the west ring interchange and to the South by the Willebroek canal; it contains just two locations: Laeken and Strombeek-Bever.

Secondary zone:
- Accounts for 23% of shoppers at the centre.
- Frequency of visits: once or twice a fortnight.
- The customer potential is 133 928 inhabitants.
- The zone extends rather more towards the north and the Flemish municipalities of Meise, Grimbergen and Vilvorde.
- The commercial offer existing in the city centre, and low accessibility, prevent any expansion of the trading area (the railway and the canal constitute natural boundaries).

Population characteristics in the trading zone (Miroir) and comparison with the Brussels-Capital Region and Belgium

	Market radius	Brussels-Capital Region	Belgium	10 minute zone comparative index / Brussels-Capital Region	10 minute zone comparative index / Belgium
Population	327.414	1.006.749	10.445.852	/	/
Ten-year demographic evolution	4,7 %	2,6 %	3,1 %		
‹ 18 years	23,04 %	21,33 %	21 %	1,080	1,097
18 - 64 years	59,5 %	62,79 %	62 %	0,948	0,960
65 years +	17,47 %	15,88 %	17 %	1,100	1,027
Average household income in €k	12,881	23,328	30,831	0,552	0,418
% job seekers	19,8 %	18,2 %	10,7 %	1,090	1,854

Residual zone:
- Accounts for the remaining 13% of shoppers.
- Visiting this centre less than once a month.

The total trading zone has a potential of 200 000 inhabitants. The age structure of the zone displays a slight over-representation of young and elderly people, with an under-representation of the working population in comparison with the structure of the Brussels-Capital Region. These differences are more pronounced in the primary than in the secondary zone.

The standard of living of the population is fairly high: in the primary zone, it is equal to the average household income in the Brussels-Capital Region, and in the secondary zone it is even higher than the average national income.

Comparative analysis of the customer base

Socio-demographic profile of the customer base

Customer target age

Customer profiles at Basilix and Miroir are very similar.
Three age classifications are represented fairly equally: the 25-39s, the 40-59s and the over 60s.
Young people visit these centres relatively seldom.
At the Basilix Shopping Centre, the over 60s are in the majority.
At Miroir, the 25-39s are present in greatest numbers, but it also attracts the over 60s to an abnormal extent for a small urban centre.
At De Wand, the 40-59s are in the majority, followed by the 25-39s and then the 15-24s.

Note: the division of Basilix's shoppers by age bracket differs slightly from that of the population in the effective trading zone. The atmosphere in the shopping centre, and the feeling of safety which it generates, encourage older people to frequent the centre.

At the Miroir Centre, there is no significant difference between these distributions (by theoretical age bracket in the effective trading zone and that observed among shoppers in the shopping centre).

At De Wand there is once again a difference, with the 15-24 bracket over-represented, and shoppers over 60 under-represented.

Customer target status

Employees are most represented in these centres (around 30%).
They are followed by pensioners and students/school children.

Population characteristics in the trading zone (De Wand) and comparison with the Brussels-Capital Region and Belgium

	Market radius	Brussels-Capital Region	Belgium	10 minute zone comparative index / Brussels-Capital Region	10 minute zone comparative index / Belgium
Population	193.302	1.006.749	10.445.852	/	/
Ten-year demographic evolution	5,0 %	2,6 %	3,1 %		
‹ 18 years	21,96 %	21,33 %	21 %	1,029	1,046
18 - 64 years	60,26 %	62,79 %	62 %	0,960	0,972
65 years +	17,78 %	15,88 %	17 %	1,120	1,046
Average household income in €k	30,347	23,328	30,831	1,301	0,984
% job seekers	12,7 %	18,2 %	10,7 %	0,695	1,183

The status of shoppers at Miroir and de Wand is average to low. These are mainly employees or pensioners with a certificate of higher secondary education.
At Basilix, status is rather low: more than 40% of shoppers have only a certificate of lower secondary education.

Frequency and reasons for visits

The frequency of visits to the Basilix Shopping Centre is close to that of the regional centres, whereas at the Miroir and De Wand centres it more closely resembles those of small urban centres.

The main reasons for visiting the Miroir and De Wand centres are closeness to the place of residence (74%), the friendly and agreeable atmosphere (20%) and the interesting commercial offer (14% and 12%). They are essentially local centres.

At the Basilix, proximity to the place of residence is also the main reason for visiting, but at a lower rate (61%), ahead of the friendly atmosphere (42%) and the commercial offer (16%).

Means of transport used

Most shoppers travel to the Basilix by car, followed by public transport, and then on foot.

More than 50% of shoppers visit Miroir on foot. The rest come by car or by public transport.

Roughly equal numbers of shoppers come to De Wand on foot or by car.

These latter two centres play more of a local role than does the Basilix.
For all three centres, public transport is relatively weak, providing no direct link with the town centre, which explains the low proportion of shoppers who use it.
Those who do use public transport take the bus to reach the Basilix, and use either the tram (70%) or the bus (26%) to visit Miroir, while for De Wand it is the other way round: 50% take the bus and 40% the tram.

Summary

Basilix Shopping Centre:

- Shoppers tend to be older and to be of relatively low status.
- They come mainly because they live nearby, but also for the friendly and pleasant atmosphere.
- They mainly travel to the centre by car.

Miroir:

- Shoppers are older than in a small urban centre. Their status is average to low.
- They frequent the centre regularly, on average every week, mainly because they live nearby.
- They mainly come on foot.

De Wand:

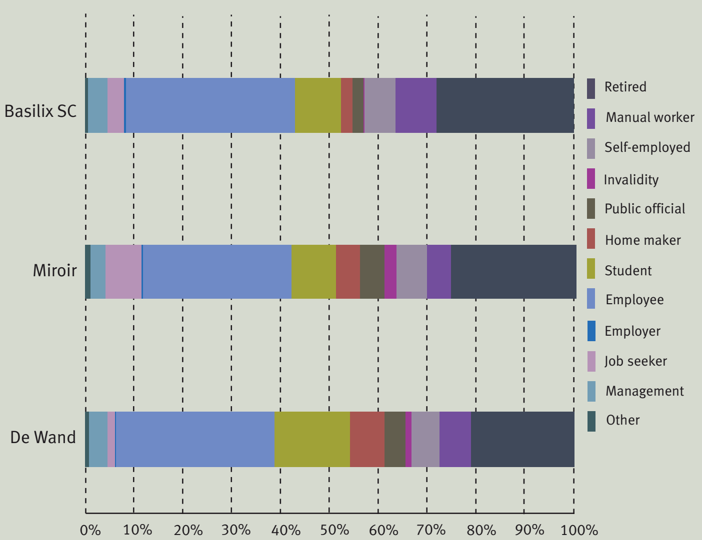
- This centre attracts more young people than the other two. Their status is average to low.
- Shoppers visit on average once or several times a week, mainly because they live nearby.
- They come on foot or by car.

The data provided by Atrium (2004-2006) enable us to establish a typical profile for shoppers at the Marie-Christine (Laeken) and Helmet (Schaerbeek) centres.

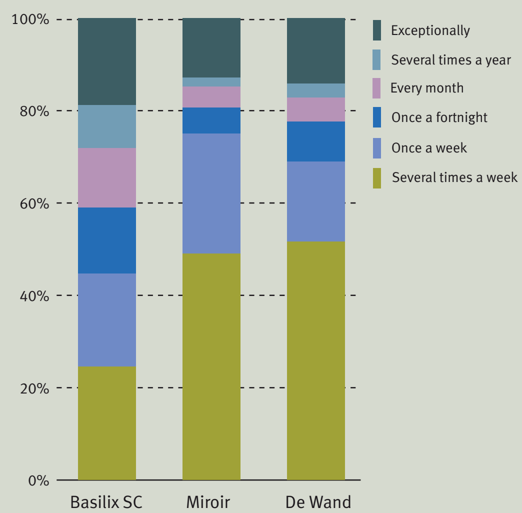
Marie-Christine:

- The typical shopper is young and single, of average to low status.
- They visit the centre alone or with friends.
- They generally visit the centre several times a week.
- They come on foot, for preference.

Socio-professional categories De Wand - Basilix - Miroir



Frequency of visits to commercial centres



Helmet:
- Again, the average shopper is young.
- Living alone or in a couple with one or more children.
- Their status is average too low.
- They visit the centre alone or with their families, several times a week.
- Shoppers mainly come on foot.

Summary

Positioning of the different centres and recommendations:

We note the absence of regional centres in this zone. The analysis of its shopping zone demonstrates that the Basilix Shopping Centre cannot lay claim to this role.
Nevertheless, it compensates both for the absence of a real regional centre in this zone, and for the absence of supplementary centres in the zone.

Both the Miroir and De Wand centres play the role of intermediate centres, but they have neither a commercial offer nor a shopping zone sufficient to position themselves as centres supplementing the regional centres.

This area is less well served by public transport (frequency, links towards the town centre). The structure of the main routes, and the natural barrier formed by the canal, both limit accessibility. Preferred journeys take place along a south-west/north-east axis.
It would therefore be very difficult to establish a centre of regional or national attraction in this zone. Its shopping zone would in practice be restricted:
- By the natural limits of the canal.
- By the influence of the Westland Shopping Centre.

The Basilix centre could nevertheless be boosted by increasing the attraction of the Brussels-Capital Region in the bordering municipalities, but without recompensing the lack of attraction of the Brussels-Capital Region to the north.

The strength of the commercial offer in the Miroir, De Wand and Marie-Christine should be increased in order to supplement the regional centres.

Accessibility by public or individual transport from these zones to the regional centres should also be improved.

A semi-continuous north-west barrier

The primary zone of the Basilix Shopping Centre covers the entirety of this north-west zone, structured along the barrier constituted by the canal. It fulfils the role of a healthy supplementary centre, limiting the attraction of the Westland Shopping Centre and drawing in customers from its primary zone beyond the limits of Berchem-Ste-Agathe and Ganshoren.

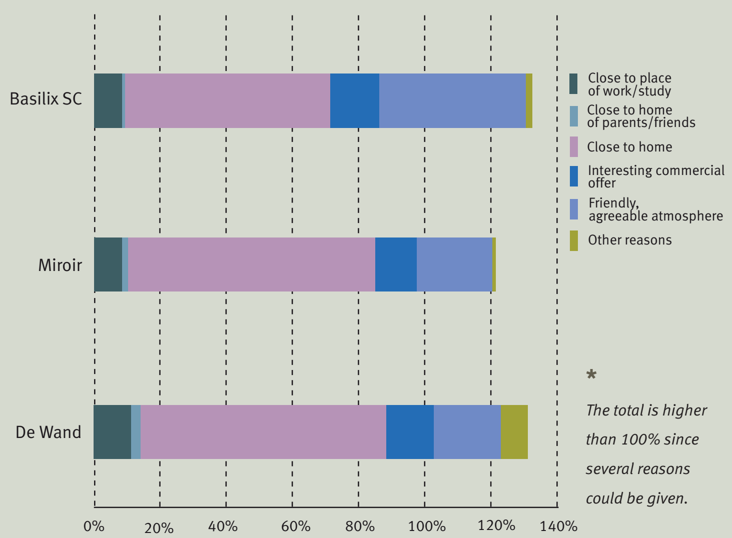
Attraction of supplementary centres on the border outside the Brussels-Capital Region

The Basilix SC, and to a lesser extent the De Wand commercial note, have a power of attraction outside the Brussels-Capital Region.

For the Basilix, this is explained by its position on the edge of the Region, and by its supplementary offer which attracts residents of the bordering municipal areas.

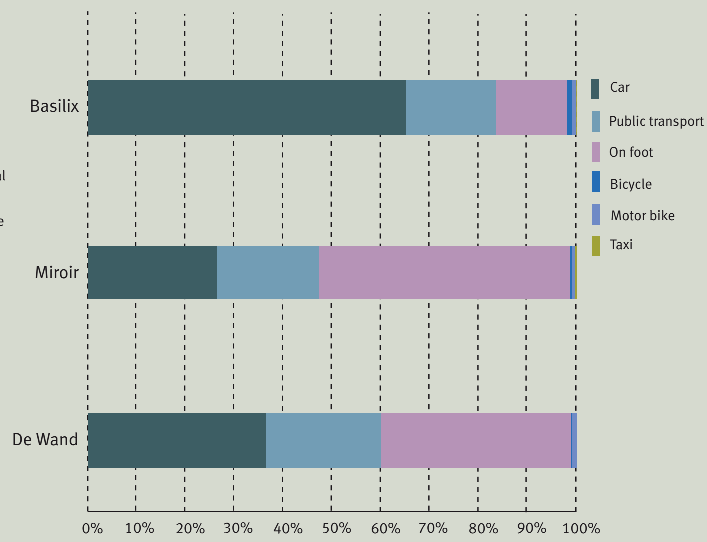
In the case of De Wand, its more limited attraction can be explained by the restricted accessibility of neighbouring districts.

Reason for visiting commercial centres*



* *The total is higher than 100% since several reasons could be given.*

Means of transport used



Analysis of the commercial offer

Uccle Centre

The shops are mainly situated along the Chaussée d'Alsemberg, the Rue Xavier de Bue, the Parvis St-Pierre and at the bottom of the Avenue Brugmann.

The commercial mix is dominated by personal goods, followed by household goods and hygiene-beauty-health, which are present in equal numbers. There are numerous well-known and attractive brand names, and two mini supermarkets. The commercial vacancy rate is rather low, demonstrating that this centre is in good health.

Accessibility: several trams and buses serve this centre directly from the Midi station or from Central Station. By car, the Chaussée d'Alsemberg links the inner ring and the town centre, while the Rue de Stalle leads to the west ring. These two routes are very busy: they are used by more than 21 000 vehicles every day, but it can be difficult to stop there (factors include the fact that parking spaces along the Chaussée tend to be occupied, other parking options badly signposted, and the passage of trams).

This centre thus provides a good alternative for local people or for occasional shoppers do not wish to go as far as the centre of town or to the shopping centres in Woluwé and Anderlecht.

Fort Jaco

The Fort Jaco centre extends along the Chaussée de Waterloo, with the shops being rather concentrated, without interruption. However, the width of the road does not encourage strolling, and shoppers rarely cross from one side to the other.

This centre also includes a small gallery, with poor visibility and little attraction, which has several vacant cells.

The commercial mix is dominated by personal goods with average to high range brand names. Hygiene-beauty-health and commercial services follow. The two food superstores occupy the extremities of the centre, leading to a high frequency rate, while the shops selling personal goods are much less often visited. This is a common trend, but it is particularly noticeable here.

The commercial vacancy rate is very low.

Accessibility: the Chaussée de Waterloo links the centre with the Brussels inner ring in one direction, and the east ring in the other. A single tramline serves the centre from the Central Station, and some rather infrequent bus lines (De Lijn) run to the Midi station. Finally the bus from Charleroi to Brussels and the express line to Waterloo pass through here.

Parking here is free, with no time restrictions... which means that all the parking spaces along the Chaussée are permanently occupied, and that it is difficult shoppers to find anywhere to park.

Comparative analysis of the commercial mix

The commercial mix in the centre of Uccle appears to be more balanced. All sectors are represented, in a more or less equal manner; there are personal goods brands of average status, and there are specialist food shops. It is very close to an average centre.

At Fort Jaco, three categories dominate the mix, while food, hospitality and to a lesser extent household goods are under-represented. The average to high status of the personal goods brands present mean that the centre is less often visited.

Population characteristics in the trading zone (Uccle Centre) and comparison with the Brussels-Capital Region and Belgium

	Market radius	Brussels-Capital Region	Belgium	10 minute zone comparative index / Brussels-Capital Region	10 minute zone comparative index / Belgium
Population	888 820	1 006 749	10 445 852	/	/
Ten-year demographic evolution	2.9 %	2.6 %	3.1 %		
‹ 18 years	21.77 %	21.33 %	21 %	1.021	1.037
18 - 64 years	62.7 %	62.79 %	62 %	0.999	1.011
65 years +	15.53 %	15.88 %	17 %	0.978	0.914
Average household income in €k	23.972	23.328	30.831	1.028	0.778
% job seekers	18.0 %	18.2 %	10.7 %	0.990	1.685

The Fort Jaco centre therefore appears to supplement the shopping centre in the middle of Uccle.

▶ see map 10 ▶ page 60
Commercial mix of Uccle centre and Fort Jaco

“Driving engines”

The criteria used to identify “driving engines” are: the number of shoppers who visit a given shop, and the exclusivity quotient.

No shop stands out clearly from the others in Uccle from the point of view of frequent use.
Shoppers take advantage of their passage through the area to make small ad hoc purchases in one or another of the mini supermarkets.
The exclusivity quotient of the two most frequented shops is fairly low, so that other businesses benefit from of presence of their customers.

At Fort Jaco, the shops most visited are not really “driving engines”, because 20% of their customers do not visit other shops. The question of parking certainly plays a part in this exclusivity.

The effective trading zone

The geo-marketing survey of these two centres took place at the beginning of May 2006. The methodology is the same as for the other centres studied: the cumulative proportion of shoppers, the frequency at which they visit and the penetration of the commercial centre.

Uccle Centre

Results of the location survey

The Uccle centre has greater importance to shoppers from places to the north and south of the Uccle municipality. Very few shoppers come from the west or the east.

▶ see map 11 ▶ page 61
Distribution of shoppers in Uccle centre Zoom on the Brussels-Capital Region

Identification of the effective trading zone

The primary zone:

- This is structured around the Chaussée de Waterloo and the Chaussée d’Alsemberg. It does not extend north-west beyond the railway line, and in the west it stops at the motorway. To the east, it is limited by the Bois de la Cambre.
- It accounts for 79% of shoppers in Uccle centre, who visit at a rate of once or twice a fortnight.
- The customer potential is 137 378 inhabitants.

The secondary zone:

- This accounts for 15% of shoppers, visiting half as often: once or twice a month.
- The customer potential is 751 442 inhabitants, on a north-south axis that includes Waterloo, Braine l’Alleud, Rhode-St-Genèse and Dworp to the south; and Laeken and the boundary of the Brussels-Capital Region to the north.

Post codes with fewer than 10 shoppers in Uccle centre

Post Code	Locality	Number of shoppers	Proportion of shoppers
1180	Uccle	462	61.5 %
1190	Forest	95	12.6 %
1060	Saint-Gilles	23	3.1 %
1630	Linkebeek	14	1.9 %
1050	Ixelles	14	1.9 %
1620	Drogenbos	12	1.6 %
1650	Beersel	12	1.6 %

The residual zone:

› Accounts for the remaining 6% of shoppers, visiting a little more than about once a month.

▶ see map 12 ▶ page 62
Effective trading zone of the Uccle centre shopping area

Socio-demographic analysis of the shopping zone

The trading zone has a population of more than 890 000.
The age structure is similar to that of the Brussels-Capital Region, with over-representation of older people in the primary zone and under-representation in the secondary zone.
The standard of living resembles that of the Brussels-Capital Region.

Fort Jaco

Results of the location survey

The Fort Jaco commercial centre is mainly a local centre, principally attracting shoppers from the municipality itself. Next come the neighbouring municipalities, and then Schaerbeek, despite its relative distance.

Identification of the effective trading zone

The primary zone:

› This is limited to the Uccle municipality itself, representing 70% of Fort Jaco's shoppers, who visit on average once or twice a week.
› The customer potential is 75 378 inhabitants.

▶ voir carte 13 ▶ page 63
Influence of the Fort Jaco centre

The secondary zone:

› Accounts for 20% of shoppers at the Centre, visiting once a fortnight.
› The customer potential is 468 922 inhabitants, in a configuration which stretches far to the south along the Chaussée de Waterloo (Waterloo and Braine-l'Alleud) and northwards along the ring (St-Josse-ten-Noode and Schaerbeek).

The residual zone:

› This accounts for the remaining 10% of shoppers, visiting on average once a fortnight.

▶ voir carte 14 ▶ page 64
Effective trading zone of the Fort Jaco commercial centre

Socio-demographic analysis of the trading zone.

The Fort Jaco trading zone has a population of almost 545 000.
In the primary zone, young people and people of working age are under-represented, and older people are over-represented in comparison with the Brussels-Capital Region.
Conversely, in the secondary zone the 18-64s are over-represented, and the over 65s under-represented.
The standard of living is quite high, with an average income in the primary zone above the national average, while it is around the Brussels-Capital Region average in the secondary zone.

▶ voir carte 15 ▶ page 65
Standard of living in the effective market radius of the Fort Jaco centre

Population characteristics in the trading zone (Fort Jaco) and comparison with the Brussels-Capital Region and Belgium

	Market radius	Brussels-Capital Region	Belgium	10 minute zone comparative index / Brussels-Capital Region	10 minute zone comparative index / Belgium
Population	544 300	1 006 749	10 445 852	/	/
Ten-year demographic evolution	2.5 %	2.6 %	3.1 %		
‹ 18 years	20.94 %	21.33 %	21 %	0.982	0.997
18 - 64 years	64.4 %	62.79 %	62 %	1.026	1.039
65 years +	14.66 %	15.88 %	17 %	0.923	0.863
Average household income in €k	24.561	23.328	30.831	1.053	0.797
% job seekers	16.9 %	18.2 %	10.7 %	0.928	1.579

Comparative analysis of the customer base

Socio-demographic profile of the customer base

Customer target age

The customer profile in these two centres is almost identical. They are frequented by older shoppers than is a small urban centre.

In the centre of Uccle, the 40-59 age bracket is over-represented by comparison with the effective trading zone and the 15-24 and over 60 brackets are slightly under-represented.

At Fort Jaco, too, the comparison between the age of shoppers and the proportion of the population in these age brackets in the effective trading zone is significant. The over 60s are over-represented, and the 25-39s under-represented.

Customer status

In Uccle centre, employees are most represented, followed by pensioners.
At Fort Jaco, the reverse applies.

Overall, these two centres are frequented by high numbers of management level staff and the self-employed.

The status of shoppers is fairly high in both centres: more than 60% have a certificate of higher education.

Frequency and reasons for visits

In the centre of Uccle, the frequency of visits is similar to that of a regional centre: one third of shoppers visit several times a week, and 20% once a week; only 13% are occasional visitors.

At Fort Jaco, 50% of shoppers are regulars, but some 20% only visit occasionally. This is close to the pattern in a local urban centre.

The main reason for visiting, in both centres, is proximity to the place of residence (65-70%). This is followed by proximity to the place of work or study.
The third reason given is the pleasant atmosphere, the commercial offer following in only fourth place in the two centres.

Means of transport used

To reach Uccle centre, 40% of shoppers travel by car, 35% on foot and 25% using public transport.
50% of shoppers reach Fort Jaco on foot, 25% by car and 22% using public transport.

In both cases, the public transport used is the tram. At Uccle, only one quarter of shoppers use the bus.

Summary

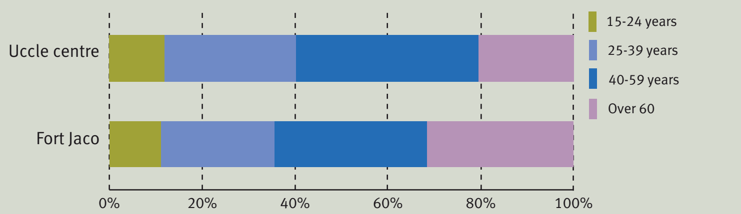
Positioning of the different centres

The centre of Uccle provides a commercial offer sufficiently large to constitute a genuine alternative to the regional centres. National and international brand names are present, but there is no “driving engine”.
There is inadequate parking making it difficult for the centre to increase its attractiveness.

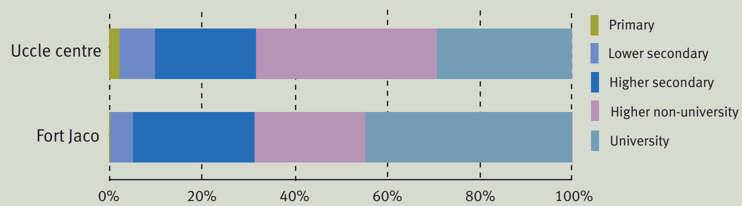
Post codes with fewer than 10 shoppers at Fort Jaco

Post Code	Locality	Number of shoppers	Proportion of shoppers
1180	Uccle	429	70.2 %
1050	Ixelles	37	6.1 %
1000	Bruxelles	22	3.6 %
1640	Rhode-Saint-Genèse	19	3.1 %
1030	Schaerbeek	12	2.0 %

Customer profile in the two commercial centres



Highest level of education successfully completed



Fort Jaco, structured along the Chaussée de Waterloo, complements it well and operates more like an urban centre on an arterial route than as a town centre shopping area. It offers quality shopping, with a large number of boutiques. This type of shopping also seems to be developing between the Vivier d'Oie and Bascule nodes. These two supplementary centres doubtless enable their customers (tending to be elderly, and of high status) to avoid visiting the regional centres.

Continuous barriers

Their primary shopping zones are located in a segment of the town limited by the two barriers already identified: to the south-west between Forest and Anderlecht, and to the south between Uccle and Watermael-Boisfort.

Attraction of supplementary bordering centres outside the Brussels-Capital Region

Their supra-regional attraction is linked to their proximity to the boundaries of the Brussels-Capital Region, along the continuing line of these two barriers.
It may be noted that their secondary zones extend beyond Waterloo, which puts them in competition with the Waterloo town centre.

Strengthened supplementary centres

The absence of a regional centre in this zone has enabled two supplementary centres to develop a wide offer - a phenomenon that did not occur in the north-west zone analysed previously. This can doubtless be explained by higher purchasing power, the central positioning in the zone, and the easy access by public transport and by car.

The establishment of a regional centre cannot be envisaged because of the lack of available land. However, the existing centres, however, could well be strengthened

› By improving the supply of parking,
› By encouraging the establishment of certain "driving engines", which could increase supra-regional attractiveness.

Nevertheless, the commercial development of Waterloo could enter into direct competition with the shopping in Uccle centre and Fort Jaco.

V COMMERCIAL DYNAMIC OBSERVED IN THE BRUSSELS-CAPITAL REGION

Overall analysis of centres frequented

Asking which other shopping centres are frequented by customers tells us which are the main competitors, why shoppers visit them, and what they go there to find. This enables us to begin to construct a hierarchy of centres.

Non-captive customers of regional centres advance as reasons the range of shops, the atmosphere, proximity to home, and lastly proximity to the workplace/place of study and convenience.

Centres are not generally mentioned by their name, but by the name of a street or a municipal area, evidence that they have no particular identity with shoppers.

Main competing centres

The main competition for regional centres comes from ... the other regional centres!
Next, customers mention locations abroad as places for shopping.
This is followed in the classification by the centre of Brussels, the Basilix Shopping Centre, the centre of Anderlecht, the Cora gallery and the IKEA in Anderlecht.

The first commercial centre outside the Brussels-Capital Region is Antwerp. This is followed by the Esplanade in Louvain-la-Neuve.

The rest of the classification includes the Rue des Tongres in Etterbeek, Waterloo and Namur. This can be explained by their geographical closeness, and by the shopping environment (fewer shops, but a good atmosphere). Nevertheless, in these last two cases customers in these shopping areas are more likely to come to make additional purchases in Brussels than the other way around.

In general shopping outside the Brussels-Capital Region is not very common: 89% of Brussels residents say that they do not visit commercial centres outside the Brussels-Capital Region.

Centre by centre analysis

... an attempt to identify emerging networks of centres.

Woluwé Shopping Centre

Additionally, customers mainly frequent the Rue Neuve – City2 centre, then Stockel (Woluwé St Pierre) and the Rue des Tongres (Etterbeek) which thus act as supplementary centres for the Woluwé SC.

Westland Shopping Centre

As well as the regional centres of the Rue Neuve – City2, the Woluwé SC and Louise, shoppers here frequent the centres in Anderlecht (Cora, Anderlecht centre and IKEA) and the Basilix Shopping Centre.

Louise

After the regional centre, this is supplemented by the Bascule and Bailli centres.
Customers also do their shopping abroad.

Porte de Namur – Toison d'Or

No apparent secondary centres.

Rue Neuve – City 2

As well as the regional centres, shoppers here mentioned the Basilix SC and the Rue de Brabant (Schaerbeek), a specialist centre easily accessible from the Rue Neuve.
Shoppers also visit the centres in Anderlecht (Cora, IKEA and centre).

Note: Shoppers from certain municipalities in the north and south of the Brussels-Capital Region are under-represented in the survey of five regional centres.

Additional analysis of the north of the Brussels-Capital Region

Basilix Shopping Centre

Here, shoppers mentioned four of the five regional centres: the Westland SC, Rue Neuve City2, the Woluwé SC, and the Louise centre. They go there for the friendly atmosphere. The Porte de Namur is never mentioned.

But these shoppers rather seldom shop elsewhere: they do not frequent any centre outside the Brussels-Capital Region.

The other commercial centres frequented because of the presence of "driving engines": H&M, Zara, C&A, Inno, Pimkie.
Only 4% say that they visit the FNAC.

Miroir

The first competing centre mentioned by shoppers in the Miroir district is the Rue Neuve – City2 (40%), for the commercial offer. Then come the Basilix Shopping Centre (because of its proximity to their place of residence), and the Westland Shopping Centre (for its friendly atmosphere and interesting range of shopping).

The other three regional centres are seldom mentioned. Again, these shoppers do not frequent centres outside the Brussels-Capital Region.

When they visit other commercial centres, the Miroir shoppers are mainly looking for clothing and shoe brands which are absent at Miroir: H&M, C&A, Zara, Inno, but also Brico and Média Markt.

De Wand

Shoppers mainly visit the regional centres: Rue Neuve – City2, the Woluwé SC, the Westland SC, Louise and Porte de Namur – for their commercial offer.

Next, they mention Vilvorde... which is where they come from: These are thus more often shoppers from Vilvorde who have come to supplement their purchases at De Wand.

Marie-Christine, Schaerbeek and the Basilix SC complete the classification. They attract shoppers for their commercial offer, and to a lesser extent because of their proximity to the place of residence.

In the centres which compete with De Wand, shoppers look for clothing shops under labels such as H&M, Zara, Inno et C&A. They also mention Carrefour, FNAC or Mango. Média Markt is only mentioned by 3% of shoppers.

Marie-Christine and Helmet

Shoppers at Marie-Christine mainly frequent the Rue Neuve, the Rue de Brabant or the Chaussée de Gand. Only 3% mentioned the Avenue Louise regional centre, and 5% that of the Porte de Namur. This is thus mainly a matter of local consumption in specialised centres.

When they do visit commercial centres, they opt for the Westland SC, then the Basilix SC, and finally for the Woluwé SC.

Shoppers at Helmet go to the shopping districts in the centre of Brussels, Ixelles or the Rue de Brabant. Almost 5% frequent the Rue Marie-Christine.

If they mention shopping centres, these are likely to be the Woluwé SC or City2. This is followed by the Westland Shopping Centre.

These results explain the under-representation of residents in the north of the Brussels-Capital Region among shoppers in the five regional centres. They mainly shop where they live in supra-local commercial nodes or in specialist centres.

The Basilix thus has an attraction close to that of a regional node. This diminishes as you move eastwards. It is clearly a case of a centre which supplements the regional centres.

In the next category, that of intermediate centres, we find Miroir, De Wand and Marie-Christine, which provide a commercial offer similar to that of a local node.

The Helmet centre, less central and separated from these by the canal and the railway line, plays no part in the east-west dynamic: instead, it looks towards the Rue de Brabant and the Rue Neuve.

Additional analysis of the south-west of the Brussels-Capital Region

Uccle centre

The main centres mentioned as visited are the five regional centres, for their commercial offer: Rue Neuve – City2; Louise; the Porte de Namur; Westland SC and Woluwé SC.

Shoppers (more than 50% of whom are Brussels residents) next make their purchases outside the Brussels-Capital Region, mainly in Waterloo.

The Bascule centre (for Inno) and Fort Jaco come next in the classification, for their commercial offer and their proximity to the place of residence. These centres are frequented almost exclusively by those living in Brussels.

When they visit other centres, Uccle shoppers frequent clothes shops which do not exist in the centre of Uccle – Inno, H&M, Zara and C&A. These brand names have a high power of attraction and are "driving engines". They also mention Cora or FNAC, but few mention Mango (3%) or Média Markt (2%).

Fort Jaco

The first centres which are also visited are Louise and the Rue Neuve – City2. Porte de Namur and the Woluwé SC are not much frequented (8% and 6% of shoppers); the Westland Shopping Centre, hardly at all (3%)

14% tend to shop in Waterloo, and 12% in the centre of Uccle, citing their commercial offer, pleasant atmosphere or reasons of proximity to their place of residence. More than 75% of the shoppers going to Waterloo live within the Brussels-Capital Region. It is the only commercial centre outside the Brussels-Capital Region mentioned. The closeness and the shopping environment explain the success of this commercial centre.

Shoppers from Fort Jaco look for clothes shops such as Zara, H&M and Inno in competing centres. Only 4% mention C&A, and only 2% mention FNAC.

Like shoppers from the north, shoppers from the south are under-represented in the regional centres, either because they shop locally or because they go outside the Brussels-Capital Region, towards Waterloo.

It is clear that the range of shopping in the centre of Uccle and at Fort Jaco complements that offered in the regional centres well, and meets the needs of the local population. These areas fall into the category immediately following that of the regional centres.

Zone of attraction of the five regional centres

▸ see map 16 ▸ page 66
Effective market radius of the five regional Centres

The whole of the Brussels-Capital Region is contained within the primary zone of at least one of the five regional centres. The primary zone evens extends beyond the Brussels-Capital Region because of the presence of the Woluwé and Westland Shopping Centres at its western and eastern extremities.

The secondary zone extends more or less homogenously towards the west (Ninove), the east (Leuven) and the south (where is covers the 30 minute zone). By contrast, there is an absence of attractiveness to the north, where the influence of the regional centres is weaker.

▸ see map 17 ▸ page 67
Effective market radius of the Woluwé and Westland Shopping Centres

Here, the effective trading zones of the two shopping centres, Woluwé and Westland, are represented in stylised form. It will be noted that they cover the entirety of the BCR, their secondary zones crossing the competing Rue Neuve – City2 commercial centre and penetrating the primary zone of the other. Municipal areas in the centre of Brussels are thus subject to the influence of these two shopping centres. There is the same effect on Braine-l'Alleud to the south.

▸ see map 18 ▸ page 68
Effective market radius of Louise and Porte de Namur centres

Although situated side by side, the Louise and Porte de Namur centres have a different power of attraction. The impact of Louise, the more specialised of the two, is greater.

Profile of brand customers

We compared the customer profiles for Inno, Zara, H&M and C&A in their different sales points.

Inno: attracts as many young people as older people, but this is not a standard profile. At the Woluwé SC, 70% of customers are aged over 40. Although the shop acts as a "driving engine", it also profits from an older element in the clientele than other shops in the centre.

Zara: customers are mainly young people: 60% are aged below 24, and 30% between 25 and 39 - but this is not a standard profile: it applies as such to the Louise and Rue Neuve – City2 centres. However, at the Woluwé and Westland Shopping Centres, only 70% of shoppers are aged below 40.

H&M: principally young customers: 50% are aged between 15 and 24, and 30%are between 25 and 39. This is profile recorded at the Woluwé SC and Porte de Namur centres. At the Rue Neuve - City2 centre, a slightly different profile emerged: the under-24s are over-represented. However, in the Westland SC the 25-39s are over-represented and the 15-24s under represented.

C&A: This brand attracts an older clientele than the previous shops: one third are aged between 40 and 59, and a quarter are over 60 (in the Woluwé and Westland Shopping Centres, and at the Porte de Namur). In the town centre, the profile changes: there are more young people aged between 15-24, and fewer over-60s.

It may therefore be concluded that these brands adapt to the differences between the town centre and shopping centres on the periphery: in the first the clientele is fairly young; in the second, older.

Dynamics of cinema consumption

The most popular cinema complex is Kinépolis in Brussels (32% of customers of whom 70% live in the Brussels-Capital Region). The convincing arguments: location, easy access and parking, the level of comfort offered.
There follow the two UCGs, at Toison d'Or and De Brouckère, with 26 and 17% of customers.

The most frequented cinema outside the Brussels-Capital Region is the Imagibraine Kinépolis. 62% of its customers come from the Brussels-Capital Region. However, the UGC cinemas in Louvain-la-Neuve are of very limited appeal to Brussels residents.

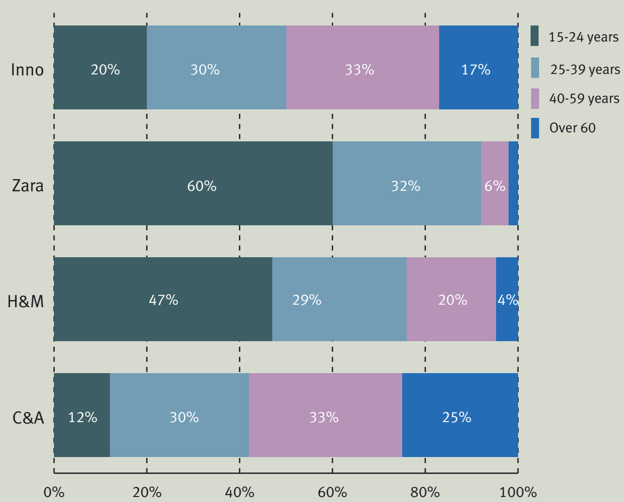
The Heysel Kinépolis mainly attracts customers from the north and west of Brussels, 17% of whom come from the Anderlecht municipality.
The UGC at Toison d'Or mainly attracts the residents of Ixelles (30% of its customers). The remaining customers come from all over the Brussels-Capital Region, though somewhat less from the north-west municipalities.
The De Brouckère UGC is little frequented by customers coming from outside the Brussels-Capital Region. They mainly come from Schaerbeek and Brussels Town. Few come from the north-west or the south-east

It should be noted that young people, aged 15-24, are more likely to visit the De Brouckère UCG and Kinepolis cinemas. Smaller cinemas, such as the Vendôme, the Arenberg or the Stockel, are more attractive to customers aged between 40 and 55. The 25-39 bracket shows no preference, and the over 60s tend to choose the Stockel.

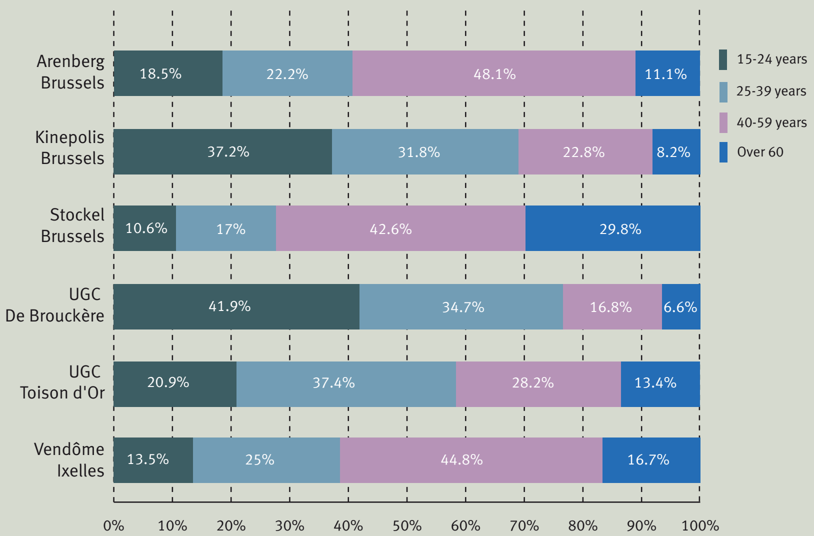
There are few differences in cinema-going habits which reflect the type of household to which customers belong. Educational level has more impact: the Vendôme, UGC Toison d'Or, Arenberg and to a lesser extent the Stockel attract more university graduates. By contrast, more than half of customers at Kinepolis have no higher educational qualifications.

Overall the Kinepolis and De Brouckère are relatively more working class, while the Vendôme, Stockel and Arenberg cinemas attract customers of higher status.

Average customer profile of four major brands



Cinemas frequented by age of customers



50% of customers in the north of Brussels mainly use the Heysel Kinepolis. Of these more than 75% come from the Brussels-Capital Region.
The two UCG cinemas come second and third. The first cinema outside the Brussels-Capital Region is the Kinepolis Imagibraine. Fewer than 2% of customers questioned said that they frequented this complex.

Customers from the south of the Brussels-Capital Region prefer to go to the UGC Toison d'Or: 30% of customers cited this cinema, of whom more than 95% live in the Region.
The Kinepolis at Heysel came in second place, with 12% of customers from the south of the capital. Its distance is doubtless the reason for this low score in relation to the level of comfort which it offers.
The first cinema mentioned outside the Brussels-Capital Region is the Kinepolis at Braine. 9% mentioned this cinema, almost as many as visit the UGC at De Brouckère (10%). This cinema thus provides an alternative to Brussels Cinemas for customers from Uccle Centre and Fort Jaco – which is not the case for the UCG complex at Louvain-la-Neuve, which only attracts 0.4%.

Summary

The surveys reveal that Brussels residents seldom shop outside the Brussels-Capital Region. Only Antwerp positions itself as a competing centre, but even this city only attracts a little more than 1%.

The surveys also confirm the fact that the Brussels-Capital Region has five regional centres of attraction: the Rue Neuve – City2, Louise, the Porte de Namur, and the Woluwé and Westland shopping centres.
The Basilix centre cannot claim to be one of these. However, the Rue de Brabant is emerging as a genuine competitor for the regional centres, particularly in the districts where the proportion of immigrant population is higher for. It may lay claim to a position as a specialist regional centre.

It should also be noted that the Rue Neuve – City2 centre is the main competitor of the other regional centres, with a concentric attraction, whereas the other four regional centres exercise their attraction over shopping areas in the four quarters of the city.

All the analyses demonstrate the absence of attractiveness of the five centres in the northern part. The causes of this are:

› Greater difficulty in accessing the centre of the town, when coming from the north,
› The absence of a regional centre in the north zone,
› The relatively near presence of attractive centres (Leuven, Mechelen, Aalst).

Cinemas most frequented by customers from the north of the Brussels-Capital Region

Cinema frequented	Number of visitors	Proportion of visitors	Number of visitors Brussels-Capital Region	Proportion of visitors Brussels-Capital Region
Kinepolis - Heysel	726	49.8 %	554	47.7 %
UGC - De Brouckère	125	8.6 %	113	9.7 %
UGC - Toison d'Or	73	5.0 %	64	5.5 %
Kinepolis Imagibraine - Braine-l'Alleud	23	1.6 %	15	1.3 %

Cinemas most frequented by customers from the south of the Brussels-Capital Region

Cinema frequented	Number of visitors	Proportion of visitors	Number of visitors Brussels-Capital Region	Proportion of visitors Brussels-Capital Region
UGC - Toison d'Or	398	29.5 %	383	32.4 %
Kinepolis - Heysel	165	12.2 %	146	12.3 %
UGC - De Brouckère	135	10.0 %	127	10.7 %
Kinépolis Imagibraine - Braine-l'Alleud	124	9.2 %	77	6.5 %
Wellington - Waterloo	46	3.4 %	40	3.4 %
Vendôme - Bruxelles	42	3.1 %	29	2.5 %
UGC – Louvain-la-Neuve	13	1.0 %	5	0.4 %

The emergence of a network affecting the commercial dynamic in the Brussels-Capital Region

We may observe a certain network logic at work in the different zones. For example around the Woluwé SC, the Stockel – Place Dumon and the Rue des Tongres centres are positioned at a lower level. For the Westland SC, these secondary centres are the Cora in Anderlecht and the Rue Wayez.

Things are less clear for the urban centres because of their more concentric arrangement. Nevertheless, the Bascule and the Bailli centres are extensions of the Louise centre.

Greater local purchasing in the North zone

The hypothesis that greater numbers of customers from the north zone shop outside the Brussels-Capital Region, and that this explains their under-representation of shoppers in the regional centres, does not hold water. It is rather the case that they do more of their shopping in supplementary nodes or specialist centres.

Two hypotheses may be advanced: firstly, that the population in this zone is older, and less mobile; and that the shopping offered in the town centre no longer corresponds to its requirements.
Secondly, accessibility by public transport and by car from the north zone is less good towards the other regional centres, and the Basilix Shopping Centre meets their needs.

In the north, the hierarchy appears to be as follows: the Basilix is the first level of the network, below which come the De Wand and Miroir nodes.
Marie-Christine, on the edge of the Basilix sphere of influence, could be usefully strengthened.

Helmet, less central and separated from the other centres analysed by the canal and the railway, plays no part in the north-west dynamic, which supports the thesis of a north-east barrier. Part of the population turns more readily to the Rue de Brabant, which acts as a specialist centre, rather than towards the other regional centres - with the exception of the Rue Neuve.

A commercial set-up compensating for the absence of a regional centre in the south-west zone.

It appears that shopping outside the region is slightly more common in the south-east zone, towards the centre of Waterloo. This attraction is reciprocated, because the centre of Uccle and Fort Jaco also attract customers from Waterloo.

But the thesis of greater consumption in these supplementary nodes is the main explanation for the under-representation of shoppers from the South in the regional centres.

These two centres are positioned in complement to the regional centres, and appear to compete with La Bascule which possesses a regional centre-type “driving engine” in the Inno gallery.

The attraction of cinemas

Customers very seldom leave the Brussels-Capital Region. It can be seen that the different cinemas follow the logic of the barriers developed in relation to shopping zones. Only UGC at De Brouckère, in a central position, sees its concentric attraction limited by the presence of Kinepolis on a south-west and north-east axis, and by the UGC Toison d’Or towards the south.

VI PROPOSED HIERARCHY OF COMMERCIAL CENTRES IN THE BRUSSELS-CAPITAL REGION

The analysis of the attraction and the operation of these commercial centres enables us to distinguish two major criteria for classification. Certain centres serve a location-specific market, while others serve a specialised market.

A location-specific centre mainly serves a continuous geographic zone bordering on its site, is commercial offer is mainly generalist and its market little segmented.

A centre serving a specialised market is characterised by a "fishing line" shopping zone: customers are not concentrated around the centre but dispersed across the whole area. The offer is based on specialisation, differentiation and a very finely segmented market. (e.g.: Rue de Brabant, Sablon etc.)

The various commercial centres of the Brussels-Capital Region have been divided into five hierarchical levels which will be subdivided to reflect this logic of special or specialist markets. The hierarchical levels make it possible to classify the centres in terms of their attraction and their commercial offer (the presence of a "driving engine", the composition of the commercial mix etc.)

Classification indicators were established on the basis of objective data. They are linked to:

› Degree of specialisation (linked to the greater or lesser concentration of shops of the same type),
› Overall attractiveness (their overall attraction score),
› The number and power of attraction of the chain stores present (percentage of chains in relation to the total number of shops, and the presence or absence of a driving engine),
› The level of the range of shops present (status of the offer).

These various indicators are weighted and combined in a summary indicator enabling us to construct a hierarchical scale. The latter provides an objective basis for classification.

On this scale, the thresholds for membership of the different hierarchical levels have been established as follows:

› Regional centres indicator above 60,
› Supplementary centres: indicator between 32 and 60,
› Intermediate centres: indicator between 26 and 31,
› Special centres: indicator below 25.

Certain centres could be reclassified to take account of aspects observed during site visits and the data obtained by the surveys.

The terminology used is that of the Retail Observatory. Nevertheless, certain non-homogenous centres have been segmented or regrouped, in order to calculate the attraction scores over homogenous spaces.
The Auderghem Carrefour and the Cora at Woluwé have been included.

This applies to:
(See table below)

Retail Observatory Terminology - boundaries and names of corresponding centres

Retail Observatory designation	Divisions and names of corresponding centres
Grand-Place	This centre has been divided into two distinct centres: the Grand'Place (tourist centre) and the Saint Jacques district (tourist centre).
Dansaert – Saint-Géry	This centre has been divided in two: the Dansaert – Orts centre (supplementary centre) and the Saint Géry centre (special centre).
Stalingrad - Lemonnier	Firstly, this centre has been divided; secondly, a segment of the Boulevard Anspach, in the extended line of the Boulevard Lemonnier, has been added to it. The two resulting centres are Lemonnier – Anspach (supplementary centre) and Stalingrad (special centre).
Marolles	This centre has been divided in two: Marolles Nord – Rue Haute and Rue Blaes (regional centre) and Marolles Sud (special centre).
Flandre – Sainte Catherine	This centre has been divided in two: the Place Sainte-Catherine (special centre) and Flandre – Sainte-Catherine (special centre).
Marché aux herbes	The Rue des Bouchers (tourist centre) has been analysed separately from the rest of the centre.
Porte de Namur	This centre has been divided in two: the Chaussée d'Ixelles (regional centre) and the Chaussée de Wavre – Matongué (special centre).
Saint- Gilles and Quartier du Triangle	The part of the Chaussée de Waterloo between the Chaussée d'Alsemberg and the Place de Saint-Gilles has been included in the Saint-Gilles centre. The Triangle district centre (Chaussée d'Alsemberg beyond the Barrière Saint-Gilles) has not been taken into account. This part of the centre can be included in the local centres and is therefore not analysed.
Louise – Lesbroussart	This centre has been reallocated to the Bailli – Vleurgat centre.
Rue de Tongres	The bottom of the Avenue Georges-Henri has been removed from this centre.
Chaussée de Mons	This centre includes the Ropsy Chaudron centre.

Hierarchical scale – summary indicator

Summary indicators have not been calculated for the Midi and Nord railway stations. They have been classified under special centres.

The same applies to the Rue de Bouchers, enclosed within the Marché aux Herbes centre, and classified under special centres.

Centre, summary indicator and hierarchical level

Centre	Summary indicator	Hierarchical level
Westland Shopping Centre	86,27	Regional
Woluwé Shopping Centre	85,85	Regional
Louise	78,70	Regional
City centre (Rue Neuve – City2)	75,03	Regional
Basilix shopping centre	73,72	Supplementary
Sablon	68,06	Regional
Boulevard de Waterloo	66,66	Regional
Porte de Namur (chaussée d'Ixelles)	61,62	Regional
Rues Haute and Blaes (Marolles Nord)	61,48	Regional

Centre	Summary indicator	Hierarchical level
Cora Anderlecht	55.12	Supplementary
Carrefour Auderghem	54.58	Intermediate
Marché aux herbes	52.54	Supplementary
Uccle Centre	47.98	Supplementary
Rue de Brabant	46.13	Regional
Saint-Géry	45.42	Special
La Bascule	42.80	Supplementary
Place Sainte-Catherine	42.26	Special
Place Dumon	41.94	Supplementary
Cimetière d'Ixelles	40.44	Supplementary
Bailli - Vleurgat	39.93	Supplementary
Rue des Tongres	38.11	Supplementary
Fort Jaco	36.58	Supplementary
Lemonnier - Anspach	35.79	Supplementary
Toison d'Or	34.94	Supplementary
La Chasse	33.80	Supplementary
De Wand	33.76	Intermediate
Rue Wayez	32.86	Supplementary
Dansaert - Orts	31.61	Supplementary

Centre	Summary indicator	Hierarchical level
Midi – Triangle d'or	30.78	Special
Avenue George-Henri	30.33	Intermediate
Miroir	30.05	Intermediate
Chaussée de Ninove	28.86	Intermediate
Place Vanderkindere	27.93	Intermediate
Place Saint-Josse	27.54	Intermediate
Dixmude – Ypres	27.44	Special
Vivier d'oie	26.57	Intermediate
Vert Chasseur	26.42	Intermediate
Chaussée de Waterloo	26.40	Intermediate
Place Keym	26.11	Intermediate
Marie-Christine	25.91	Intermediate
Saint Gilles - Triangle	25.87	Intermediate
Janson	26.78	Special
Chaussée de Wavre – Arsenal	25.64	Intermediate
Molenbeek centre	26.62	Intermediate

Centre	Summary indicator	Hierarchical level
Karreveld	25.00	Special
Louvain – Paduwa	24.92	Special
Quartier Saint-Jacques	24.75	Special
Flandre – Sainte-Catherine	23.81	Special
Grand-Place	23.76	Special
Langeveld	22.85	Special
Bizet	22.54	Special
Helmet	22.33	Intermediate
Chaussée de Wavre (Matongué)	22.30	Special
Marolles sud	22.19	Special
Ravenstein	22.16	Special
Flagey	21.85	Special
Stalingrad	21.46	Special
Chaussée de Mons	20.65	Special
De Fré	19.95	Special
Docteur Schweitzer	14.80	Special
Place Jourdan	13.93	Special
Dansaert	13.63	Special
Charles Quint	12.74	Special
Vekemans	12.74	Special
Houba de Stooper	12.33	Special
Wavre – Souverain	11.71	Special
Luxembourg	11.62	Special
Etoile – Coghen	10.28	Special
Place Saint-Denis	9.70	Special
Rue Vanderkindere	9.69	Special
Dailly – Chazal	9.66	Special

Regional centres and Supra-regional centres

These are capable of attracting customers from across the region and even beyond, due to their image, and the strength and diversity of their offer. They meet at least one of the following criteria:

1. They have a broad non-food offer, particularly of personal goods.
2. They are valued by the major chains and brands.
3. Their offer is general attractive, both quantitatively and qualitatively (number of shops, "driving engine", top of the range or specialist shops etc.).

Sub-categories may be distinguished:

Urban centres

The supra-regional Brussels centre:

- The Rue Neuve – City2

The unplanned location-specific regional centres:

- Louise
- Porte de Namur

Regional centres with specialist markets:

- Le Sablon (household goods)
- Les Marolles (north) – Rue Haute and Rue Blaes (household goods)
- Boulevard de Waterloo (luxury goods)
- Rue de Brabant (ethnic goods)

Planned suburban or peri-central centres

- Woluwé Shopping Centre
- Westland Shopping Centre

▶ see map 19 ▶ page 69
Regional centres

Supplementary centres

These have an inter-municipal impact, which supplements that of the regional centres and offers an alternative to customers not wishing to visit such regional centres.

Their offer is diverse, with a predominance of personal goods. The proportion of chain stores is high, usually above 10%, but as these are already present in many other centres they have a reduced potential for attraction.

Urban centres

Supplementary unplanned location-specific centres

- Marché aux Herbes
- Uccle centre
- La Bascule
- Place Dumon
- Ixelles Cemetery
- Bailli – Vleurgat
- Rue des Tongres
- Fort Jaco
- Toison d'Or
- La Chasse
- Rue Wayez

Two complementary centres with specialist markets

- Dansaert – Orts
- Lemonnier – Anspach

Planned suburban or peri-central centres

- Basilix Shopping Centre (no "driving engine", trading area too restricted to be included in the higher category)
- Cora Anderlecht

▶ see map 20 ▶ page 70
Supplementary centres

Intermediate centres

These are of more limited attraction, with a quantitatively satisfactory commercial offer (at least 100 commercial outlets), but are lacking in quality. Some chain stores are present, but they represent less than 10% of the trade.

Centres in this category are not very specialised, they operate around their food superstores but also meet the needs of the population for semi-occasional purchases (mainly personal or household goods).

We can distinguish:

The 15 urban centres

- De Wand
- Avenue Georges-Henri
- Miroir
- Chaussée de Ninove
- Place Vanderkindere
- Place St-Josse
- Vivier d'Oie
- Vert Chasseur
- Chaussée de Waterloo
- Helmet
- Place St Josse
- Vivier d'Oie
- Vert Chasseur
- Chaussée de Waterloo
- Marie-Christine
- St-Gilles – Triangle
- Chaussée de Wavre – Arsenal
- Molenbeek centre

One "suburban or peri-central" planned centre

- Carrefour Auderghem

▶ see map 21 ▶ page 71
Intermediate centres

Special centres

These exercise their attraction within a local sphere, on shoppers in the area. Their commercial offer is fairly wide, services and food play an important role, but there are no or few brands and there are few personal goods.

We can distinguish:

Local influence centres, offering days to day goods and services

› Flandre – Ste-Catherine
› Chaussée de Wavre (Matongué)
› Flagey
› De Fré
› Place Jourdan
› Dansaert
› Vekemans
› Etoile – Coghen
› Place St-Denis
› Rue Vanderkindere
› Cora Woluwé
› Marolles Sud

Liaison centres

They are characterised by their position along the major traffic routes, and require parking facilities for customers:

› Karreveld
› Stalingrad
› Langeveld
› Bizet
› Chaussée de Mons
› Docteur Schweitzer
› Charles Quint
› Houba de Strooper
› Wavre – Souverain
› Dailly – Chazal
› Janson
› Louvain – Paduwa

Tourist centres with a specialist market

These centres are intended for leisure and/or a tourist clientele, and are all situated in the Brussels-Capital Region hypercentre:

› Grand-Place
› Rue des Bouchers
› Place Ste-Catherine
› St-Gery
› Quartier St-Jacques

Les pôles de transit

These are situated in or near the railway stations, and have at least one of the following characteristics:

- They are most active when commuters are passing through (beginning and end of the working day, weekdays);
- They are also busy around lunchtime, with the surrounding economic activity;
- There are specialist shops for an international clientele in transit (in the major railway stations and at the airport):
  › Midi station
  › Nord station
  › Ravenstein
  › Luxembourg

Wholesale trade centres

Not intended for he use of private individuals, these nevertheless contribute to the dynamic of trade in the Brussels-Capital Region, with a supra-regional impact:

› Dixmude – Ypres
› Midi – Triangle d'Or

▶ see map 22 ▶ page 72
Special centres

Local centres

These are the local centres recorded in the Retail Observatory. They have not been visited, and nor was their attraction measured. They generally offer an incomplete range of goods, with a strong emphasis on local services.

VII DEFINING THE DEGREE OF ATTRACTION OF COMMERCIAL CENTRES IN THE BRUSSELS-CAPITAL REGION

Methodology

To measure the attractiveness of the various centres in the Brussels-Capital Region several criteria were adopted, a site visit was carried out and a mark was given (from 1, poor, to 4, excellent) for:

- **The commercial offer**
- **Accessibility by car**
- **Street parking**
- **Accessibility by public transport**
- **The general atmosphere**
- **Pedestrian space**

The overall attraction score is between 0 (the lowest score) and 100 (the top mark, the highest score that a commercial centre could obtain for each criterion). The higher the score, the more attractive the centre. The difference between two scores represents the attraction differential.

In order to compare what is comparable, the analysis of the overall attraction of commercial centres in Brussels is carried out by hierarchical level (except in the case of shopping centres, which are analysed together).

Urban centres and shopping centres are analysed using two distinct grids in order to take account of their particular characteristics in terms of the criteria for attraction.

1. The criteria for urban centres

- **The commercial offer**
  The number of commercial cells
  The balance between chains/independent shops
  The number of shops acting as "driving engines"
  The degree of specialisation
  The percentage of vacant cells
  The percentage of commercial activities
  The presence of services
  The development of the centre between 1997 and 2002 (based on the data in the Retail Observatory)

- **Street parking**
  The number of parking spaces in relation to the number of shops
  Saturation
  Price
  The presence of an off-road car park.

- **Accessibility by car**
  Macro accessibility

- **Accessibility by public transport**
  The proximity of a stop on a major line
  Number and frequency of major lines
  The proximity of a stop on a secondary line
  Number and frequency of secondary lines

- **The general atmosphere**
  Cleanliness, waste bins
  Cleanliness of streets
  The quality of the layout of public space
  Condition of buildings

› **Pedestrian space**
Situation of pedestrians in relation to traffic,
Presence and safety of pedestrian crossings
width of pavements,
Adaptation and arrangements for persons with restricted mobility.

2. The criteria for shopping Centres

› **The commercial offer**
The number of commercial cells
The m^2 of shops
The balance between chains/independent shops
The number of shops acting "driving engines"
The percentage of vacant cells
The presence of services

› **Street parking**
Saturation
Price
Layout, traffic
State of road surface

› **Accessibility by car**
Macro accessibility
Micro accessibility
Visibility of commercial centre

› **Accessibility by public transport**
The proximity of a stop on a major line
The proximity of a stop on a secondary line
Number and frequency of secondary lines
Safety of area between stop and centre, micro-accessibility

› **The general atmosphere**
Cleanliness, waste bins in the mall
The quality of the layout of public space
Entertainment

› **Customer services**
The presence of an ATM
Signposting of shops
Play areas for children

› **Pedestrian space**
Pedestrian signposting
Adaptation and arrangements for persons with restricted mobility

Summary by hierarchical level

Initially, the analysis focuses on the overall attraction of the different commercial centres, making it possible to identify the deficiencies or surplus attractions of one centre as compared with others in the same hierarchal level.
At the second stage, the analysis will consider the contribution of the different categories of criteria to the overall power of attraction of commercial centres (four categories of criteria, addressing the commercial offer; parking; the shopping atmosphere/environment; accessibility by car and public transport). This will enable us to identify the criteria which need work to increase attraction.

A third stage of the analysis will consider the strengths and weaknesses of each centre.

Overall analysis of attraction within the different hierarchical levels

Integrated shopping centres

Two groups of shopping centres emerge: the three in major shopping centres in the Brussels-Capital Region, the regional attraction of which is recognized; and the Basilix, along with two shopping malls, the Cora in Anderlecht and Carrefour in Auderghem, which are organised around a hypermarket. The gulf between the two demonstrates the fact that they belong to different hierarchical levels.
▸ See global thermometer page 45

Regional centres

Two characteristics are highlighted: specialist centres receive a lower score than the others; the Rue de Brabant is markedly less attractive than the other regional centres.
▸ See global thermometer page 45

Supplementary centres

The Place Dumon centre stands out from the others; La Bascule and La Chasse are less attractive than the others.
▸ See global thermometer page 45

Intermediate centres

The best attraction score goes to the Avenue Georges-Henri. Helmet, the Wavre – Arsenal centre and the Vert-Chasseur received the lowest scores.
▸ See global thermometer page 45

Special centres

Liaison centres
▸ See global thermometer page 46

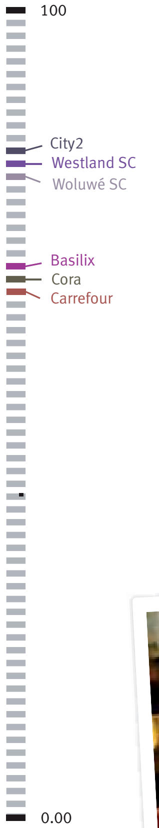
Local influence centres
▸ See global thermometer page 46

Tourist centres
These are very attractive, when compared with other special centres. St-Géry stands out quite sharply.
▸ See global thermometer page 46

Transit centres
Only Ravenstein and Luxembourg were taking into account; the analysis grids used were not suitable for the Midi or Nord railway stations. Neither urban centres nor integrated shopping centres, this type of centre caters exclusively to customers in transit and exercises no significant attraction.
▸ See global thermometer page 46

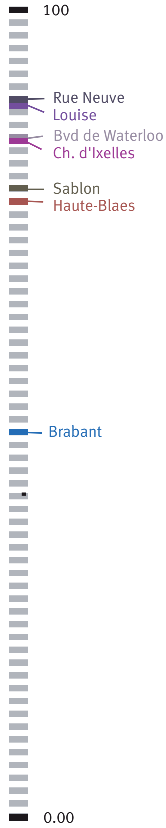
Integrated shopping centres

Commercial centre	Attractiveness score
City 2 (regional centre)	82.21
Westland SC: (regional centre)	80.69
Woluwé SC (regional centre)	79.,08
Basilix (supplementary centre)	67.44
Cora Anderlecht (supplementary centre)	66.07
Carrefour Auderghem (intermediate centre)	64.00
Cora Woluwé (special centre)	xx



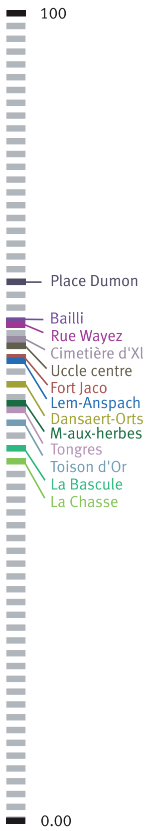
Regional centres

Commercial centre	Cote d'attractivité
City centre (rue Neuve)	70.05
Avenue Louise	69.32
Boulevard de Waterloo	65.47
Porte de Namur (Chaussée d'Ixelles)	65.40
Sablon	62.54
Rues Haute and Blaes (Marolles)	61.40
Rue de Brabant	37.10



Supplementary centres

Commercial centre	Attractiveness score
Place Dumon	66.38
Bailli – Vleurgat	61.99
Rue Wayez	61.56
Cimetière d'Ixelles	59.59
Uccle Centre	58.90
Fort Jaco	57.31
Lemonnier – Anspach	56.76
Dansaert – Orts	54.09
Marché aux Herbes	51.65
Rue des Tongres	51.13
Toison d'Or	49.18
La Bascule	46.73
La Chasse	44.75



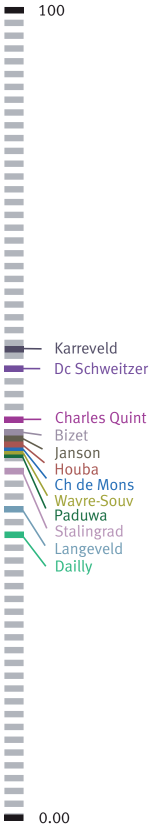
Intermediate centres

Commercial centre	Attractiveness score
Avenue Georges-Henri	63.23
Molenbeek centre	60.03
De Wand	59.49
Chaussée de Ninove	58.90
Miroir	53.89
Marie-Christine	52.12
Place Vanderkindere	51.40
Saint-Gilles centre	51.02
Vivier d'Oie	48.49
Place Saint-Josse	48.01
Chaussée de Waterloo	43.33
Place Keym	40.61
Helmet	38.22
Chaussée de Wavre – Arsenal	36.87
Vert Chasseur	35.43

Special centres

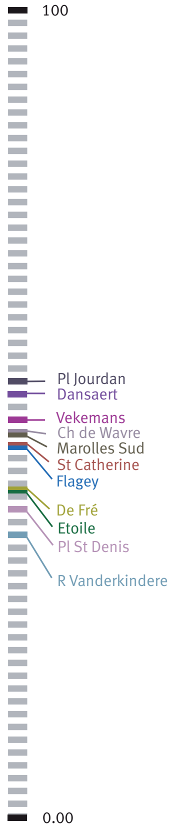
Liaison centres

Commercial centre	Attractiveness score
Karreveld	57.83
Docteur Schweitzer	55.35
Charles Quint	49.27
Bizet	48.15
Janson	46.94
Houba de Strooper	45.80
Chaussée de Mons	45.36
Wavre – Souverain	45.28
Louvain – Paduwa	45.16
Stalingrad	43.35
Langeveld	37.46
Dailly – Chazal	35.46



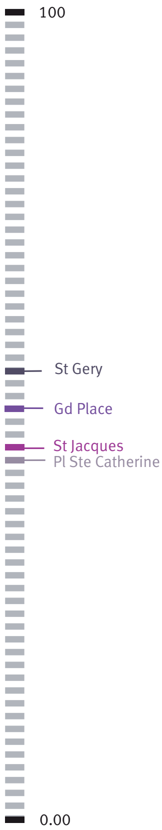
Local influence centres

Commercial centre	Attractiveness score
Place Jourdan	53.88
Dansaert	52.71
Vekemans	49.28
Chaussée de Wavre – Matongué	47.22
Marolles Sud	46.80
Flandre – Sainte-Catherine	45.75
Flagey	45.48
De Fré	40.45
Etoile – Coghen	39.74
Place Saint-Denis	37.50
Rue Vanderkindere	35.59
Cora Woluwé	xx



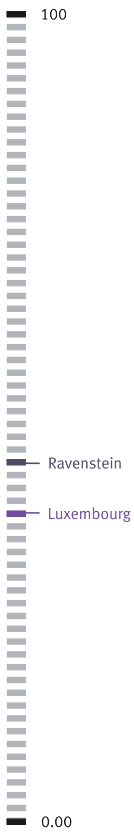
Tourist centres

Commercial centre	Attractiveness score
Saint-Géry	54.52
Grand-Place	49.76
Quartier Saint-Jacques	46.27
Place Sainte-Catherine	45.39



Transit centres

Commercial centre	Attractiveness score
Ravenstein	46.68
Luxembourg	41.16



Contribution of the different criteria to overall attraction

Only Ravenstein and Luxembourg were taking into account;
the analysis grids used were not suitable for the Midi or Nord railway stations.

Neither urban centres nor integrated shopping centres, this type of centre caters exclusively to customers in transit and exercises no significant attraction.

		Chains	Key brands	Empty units	Closed commercial units	Car park capacity	Car park saturation	Cleanliness	Waste bins	Public space	Condition of buildings	Stop on major line	Major lines	Secondary lines	Stop on secondary lines	Macro accessibility
	Name of centre	Commercial offer				Car park		Atmosphere				Accessibility				
Regional centres	Centre-ville (rue Neuve)					x										
	Avenue Louise					x										
	Boulevard de Waterloo					x										
	Chaussée d'Ixelles (Porte de Namur)					x				x						
	Sablon											x	x			
	Rues Haute et Blaes											x	x			
	Rue de Brabant						x	x		x		x	x			x
Supplementary centres	Place Dumon															
	Bailli – Vleurgat	x											x			
	Rue Wayez												x			
	Cimetière d'Ixelles															
	Uccle centre					x						x	x			
	Fort Jaco						x			x		x	x			
	Lemonnier - Anspach	x		x												
	Dansaert - Orts															
	Marché aux herbes			x		x										
	Rue des Tongres					x				x						
	Toison d'or			x		x	x									
	La Bascule			x		x						x	x			
	La Chasse											x	x			

	Name of centre	Chains	Key brands	Empty units	Closed commercial units	Car park capacity	Car park saturation	Cleanliness	Waste bins	Public space	Condition of buildings	Stop on major line	Major lines	Secondary lines	Stop on secondary lines	Macro accessibility
		Commercial offer				Car park		Atmosphere				Accessibility				
Intermediate centres	Avenue George - Henri					x						x	x			
	Molenbeek centre	x		x						x						
	De Wand											x	x			
	Chaussée de Ninove				x			x	x	x						
	Miroir									x		x	x			
	Marie-Christine					x		x					x			
	Place Vanderkindere						x			x		x				
	Saint-Gilles centre			x			x					x	x			
	Vivier d'oie	x	x									x	x			
	Place Saint-Josse	x		x						x		x	x			
	Chaussée de Waterloo	x				x						x	x			
	Place Keym	x										x	x			x
	Helmet	x					x			x				x		
	Chaussée de Wavre - Arsenal	x			x					x		x	x	x		
	Vert Chasseur	x	x		x		x			x		x	x			
Liaison centres	Stalingrad			x								x	x			
	Karreveld			x						x						
	Langeveld				x		x			x						
	Bizet			x						x			x			
	Chaussée de Mons			x			x	x		x						
	Docteur Schweitzer											x	x			
	Charles Quint									x		x				
	Houba de Strooper				x					x			x			
	Wavre – Souverain											x	x	x		
	Dailly – Chazal															
	Janson			x						x		x	x			
	Louvain - Paduwa									x		x	x			


	Name of centre	Commercial offer				Car park		Atmosphere				Accessibility				
		Chains	Key brands	Empty units	Closed commercial units	Car park capacity	Car park saturation	Cleanliness	Waste bins	Public space	Condition of buildings	Stop on major line	Major lines	Secondary lines	Stop on secondary lines	Macro accessibility
Local influence centres	Place Jourdan											x				
	Dansaert			x						x						
	Vekemans			x						x						
	Chaussée de Wavre - Matongué			x						x						
	Marolles sud			x				x		x						
	Flandre Sainte-Catherine			x												
	Flagey			x			x	x			x					
	De Fré				x					x		x	x			x
	Etoile – Coghen			x	x											
	Place Saint-Denis											x	x			x
	Dailly – Chazal															
	Rue Vanderkindere											x	x		x	x
Wholesale trade centres	Dixmude - Ypres				x		x			x		x	x			
	Midi – Triangle d'or			x			x	x	x	x		x	x			
Transit	Ravenstein			x						x				x		
	Luxembourg			x	x							x	x			
Tourist centres	Saint Géry						x									
	Grand-Place			x			x									x
	Quartier Saint Jacques						x					x				
	Place Sainte Catherine			x												

Conclusion

Conclusion

Commerce is clearly a very important factor in the attractiveness of a town, and a crucial element in the quality of life of its residents. It forms part of the pleasure of walking in the city, but above all it is indubitably one of the criteria in the choice of an area to live.

The existing commercial nodes are the key element in the Brussels commercial offer.

The first recommendation of the Commercial Development Perspective is that the commercial fabric of the region must be maintained.

A close analysis of this fabric reveals a hierarchy of the different commercial poles in existence.

When we examine the map of this hierarchy, it is clear that some commercial nodes should be maintained at their current level yet are losing ground; and that others must be raised to a higher category because they are at present failing to fulfil their role. It appears in particular the upper town (with the “Toison d’Or” Centre, recorded in the hierarchy as ‘only’ a supplementary centre) and the Rue Neuve–City 2 centre, which ought to operate at a supra-regional level, do not currently occupy the place they deserve. The same is true of smaller centres, such as Marie-Christine, Helmet, Uccle Centre, Bascule and Fort-Jaco.

The Commercial Development Perspective analysis identifies the strengths and weaknesses of commercial centres and suggests ways of improving the dynamism of shopping facilities in Brussels: effort should be put into the qualitative improvement of the existing supply, and into the specialisation of commercial centres to attract a specific customer segment or the strengthening of the identity of such centres.

New projects can develop around these existing centres if they meet certain conditions. They should:

› Be of small size and appropriately dimensioned to strengthen the existing supply by the development of commercial draws and/or improving the specialisation of a centre,
› Provide links between the existing centres,
› Be open to the commercial centres,
› Permit the development of parking facilities for customers of the commercial centre.

It is also a matter of striking a balance between strengthening the existing offer and the development of a new offer. This entails defining a commercial policy which can meet the challenge of encouraging and accompanying these developments. It is necessary at once to encourage the development of initiatives, at whatever scale they may be, and to accompany them in such a way as to enable them to play a part in the development of a strong and consistent commercial offer.

For their part, the public authorities should also invest in infrastructure to change the image of certain districts. It is also essential to intervene in matters of mobility, accessibility, safety, cleanliness and perhaps also opening hours.

Taken together, these measures should have the effect of bringing a fresh dynamism to commerce in the Brussels-Capital Region and of developing a quality commercial offer enabling Brussels to play to the full its role as an international capital, not least in competing with towns such as Antwerp and Lille with which it finds itself in competition today.

What can we learn from the Commercial Development Perspective?

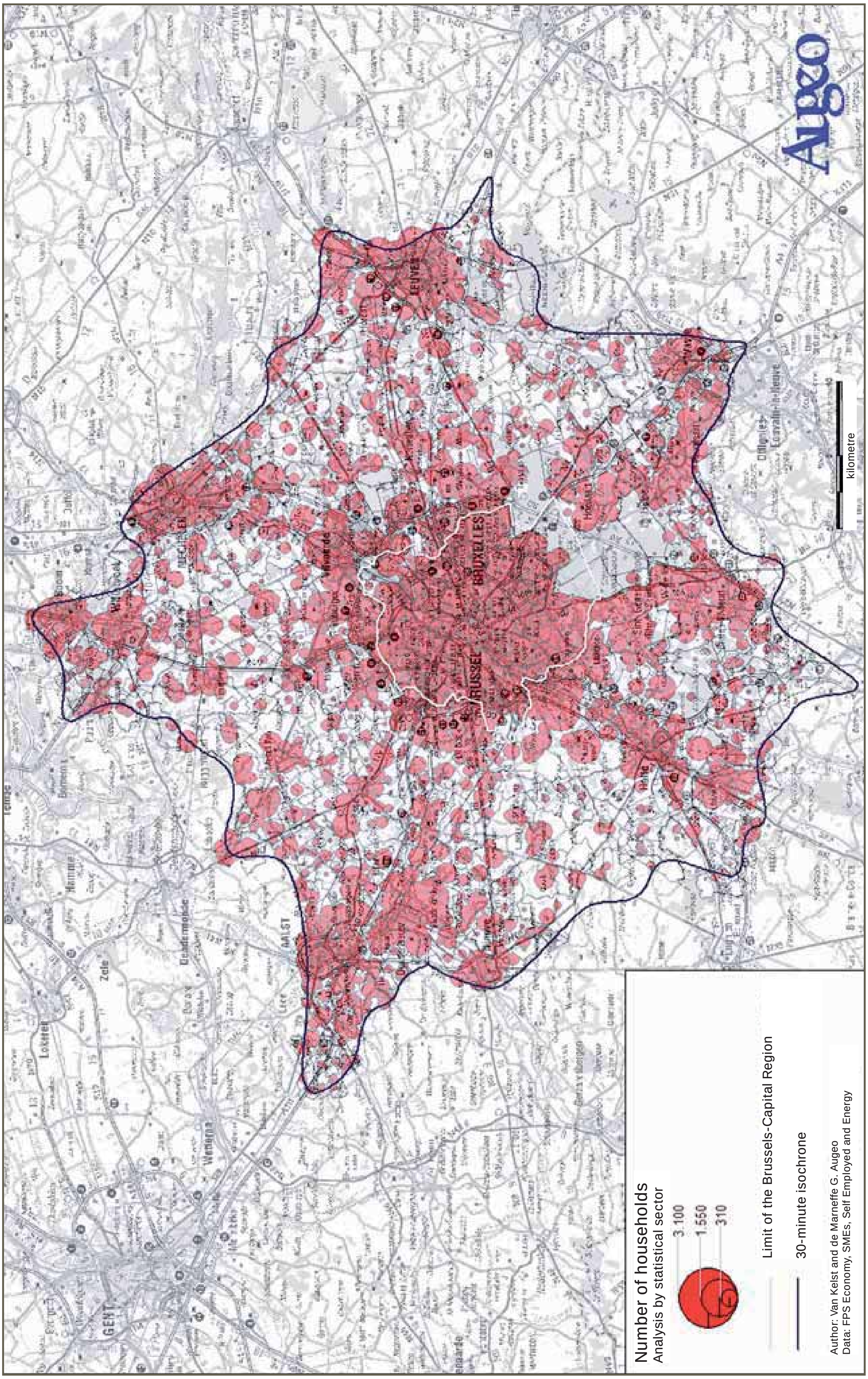
The maps clearly demonstrate that the commercial attraction of Brussels extends beyond the regional territory to the east with the Woluwe Shopping Center, and to the west with the Westland.

It is also obvious that although the absence of a regional centre is relatively compensated in the south by the existence of several “strong” supplementary centres (Uccle Centre, Fort-Jaco, Bailli, Cimetière d’Ixelles), there is a real absence of “global” commercial offer to the north: there is only one supplementary centre (Basilix) and a few intermediate centres (Marie-Christine, Miroir, Helmet and Wand).

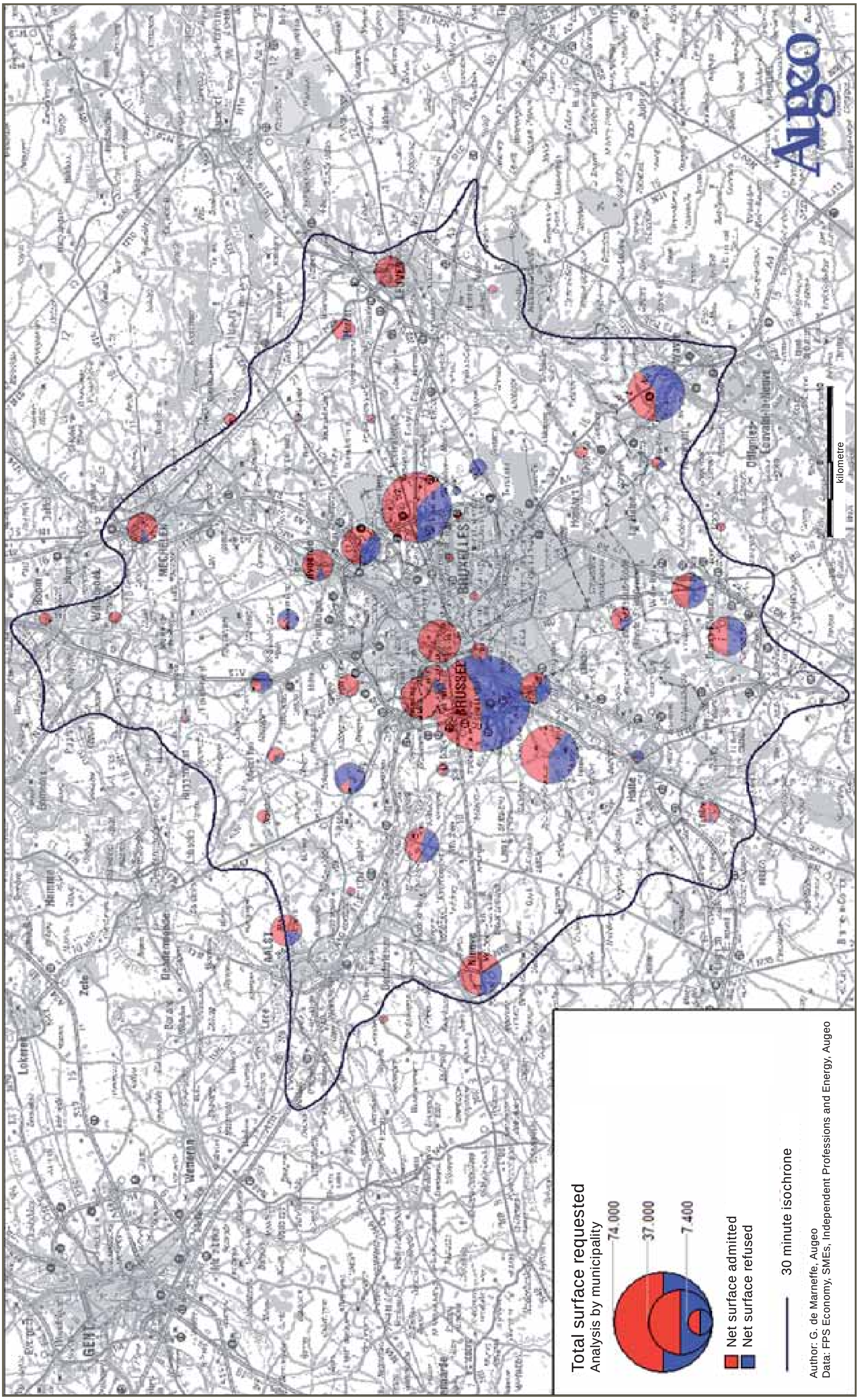
It therefore appears that there might perhaps be space for a new commercial development to the north of Brussels. That said, we should stress from the outset that any such new commercial development must have an obvious added value in relation to the existing commercial offer. The development of a new commercial centre should lead to an increase of the market radius of the Brussels-Capital Region and not enter into competition with the existing offer. The accessibility of the site, the specialisation and the originality of the concept should also enable this new commercial structure to have a supra-regional impact despite the “barriers” observed in terms of zones of attraction.

The key lesson of this document can thus be summarised in a single word: complementarity: the complementarity of the supply, the complementarity of economic, planning and mobility policies, and, finally, the complementarity of the public and private players.

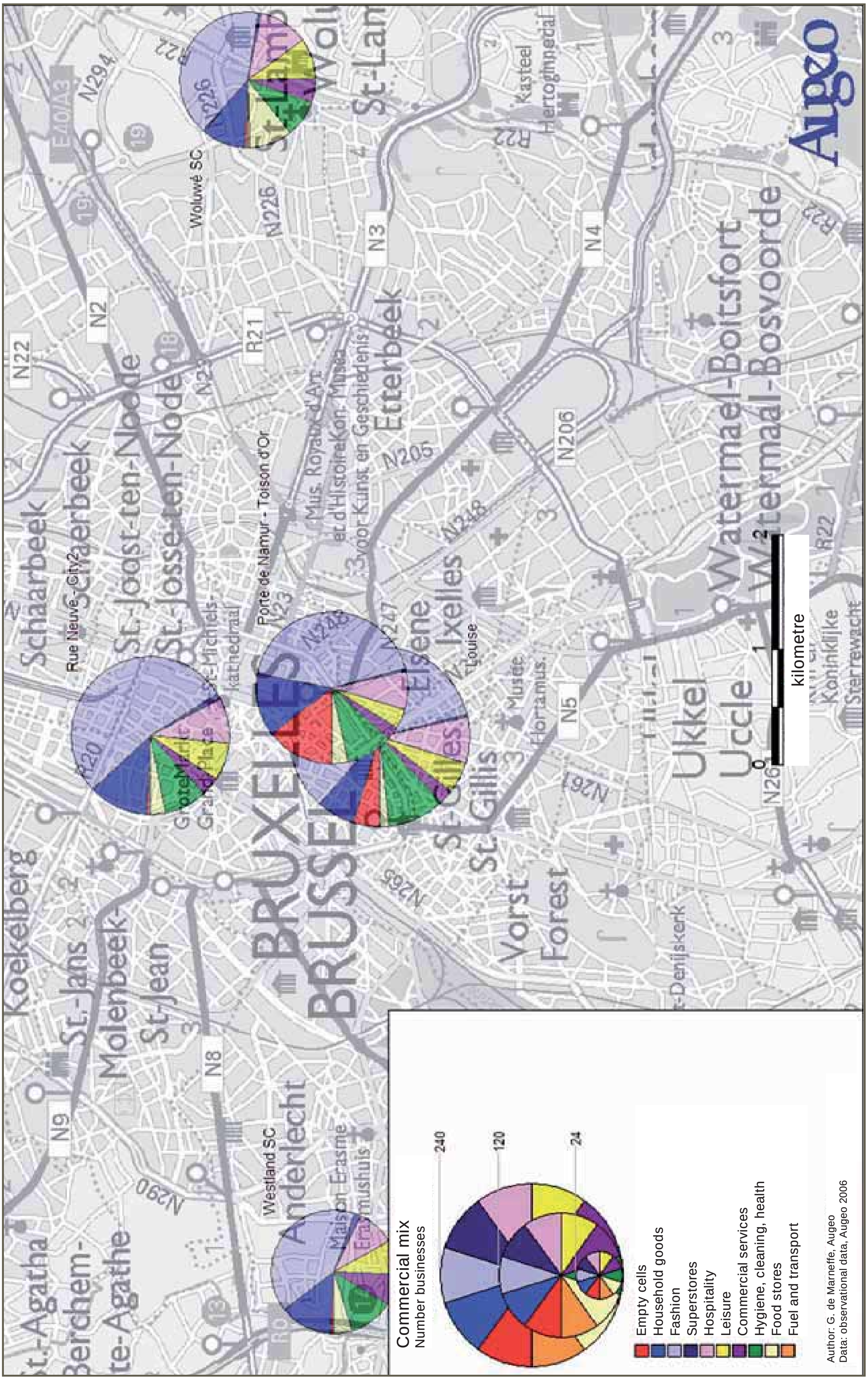
Map 01 - Population in the iso 30



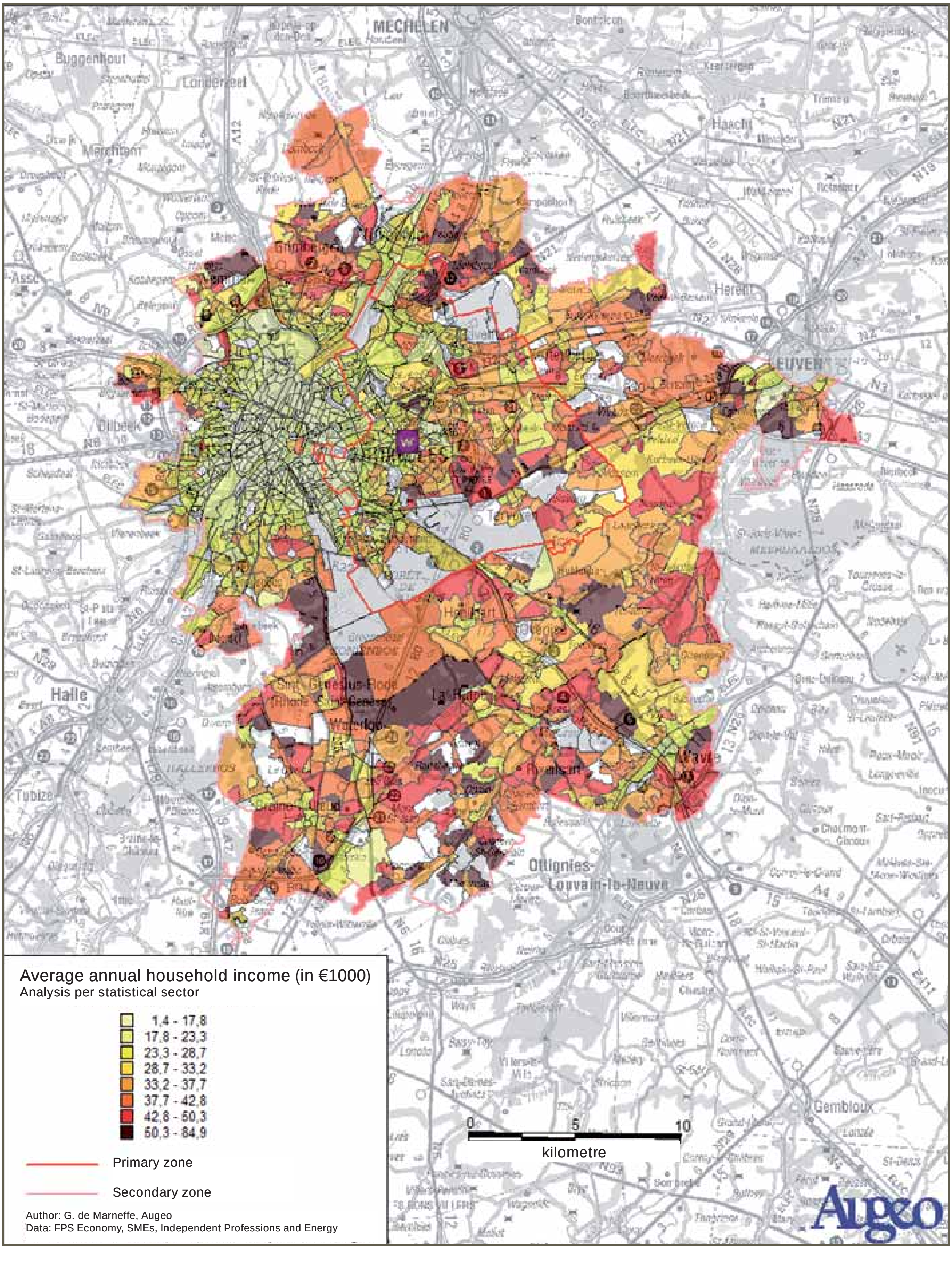
Map 02 - Dossiers examined by the Economic and Social Council for Distribution between 2000 and 2004 in the 30 minute isochrone



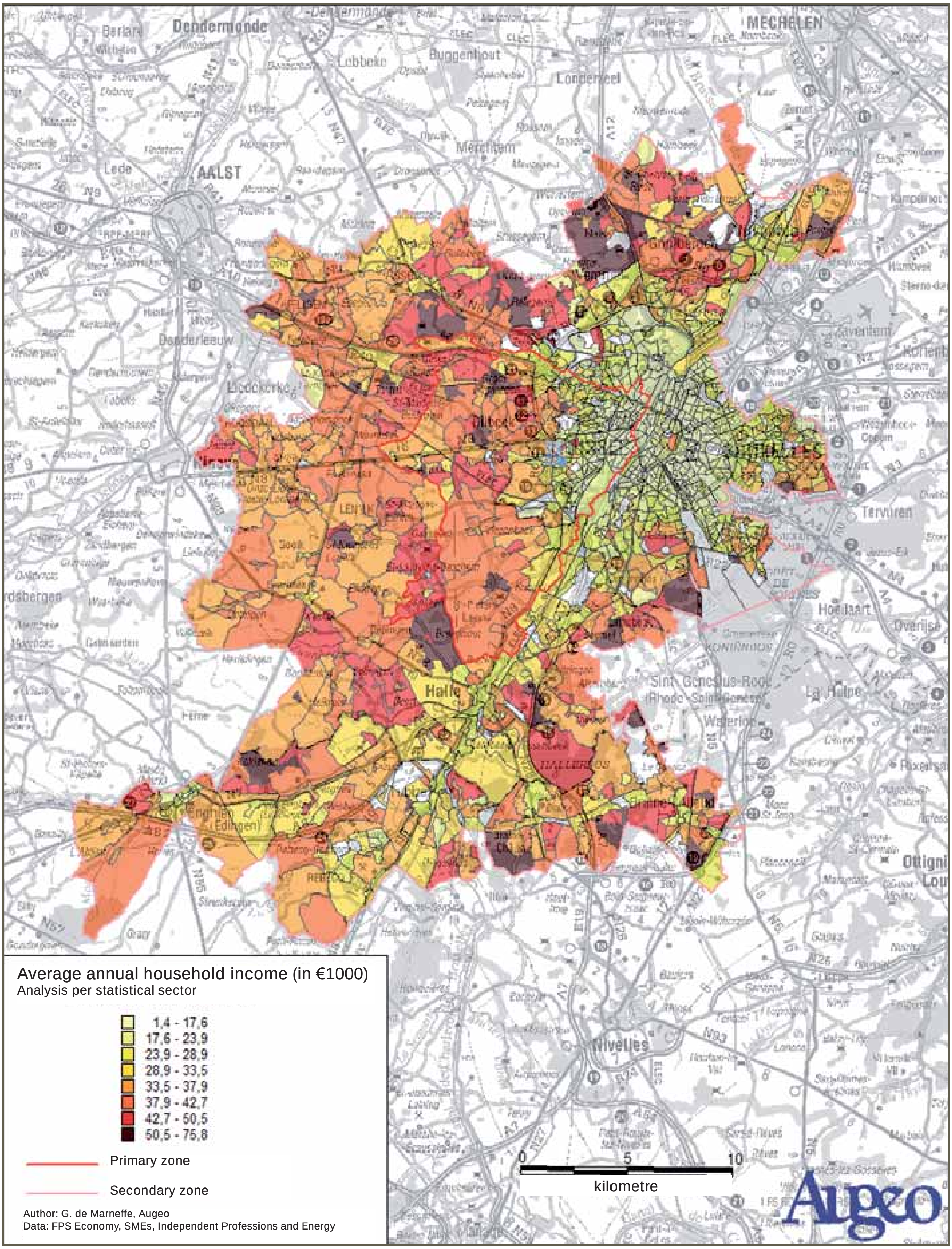
Map 03 - Commercial mix of the five regional centres



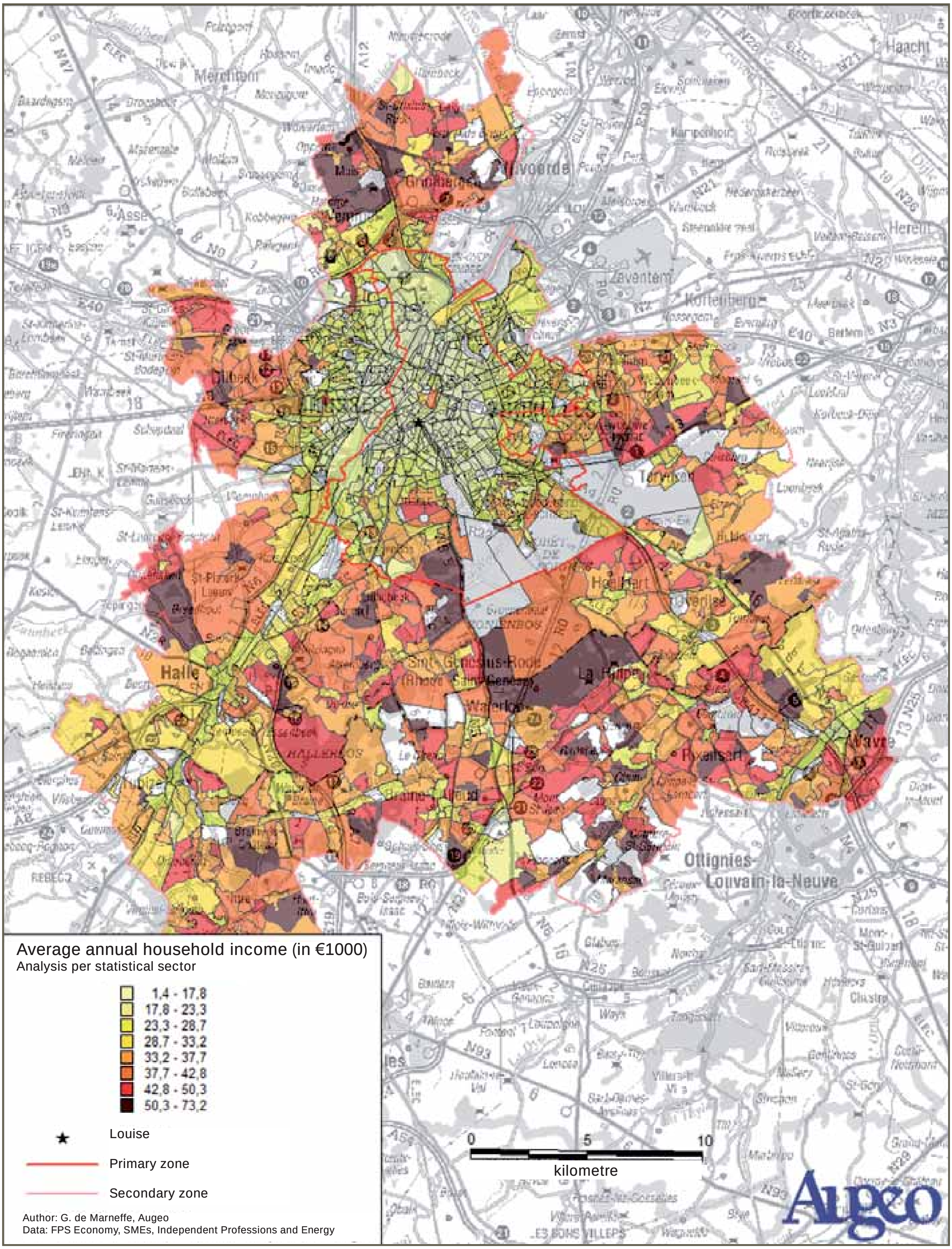
Map 04 - Standard of living in the effective market radius of the Woluwé Shopping Centre



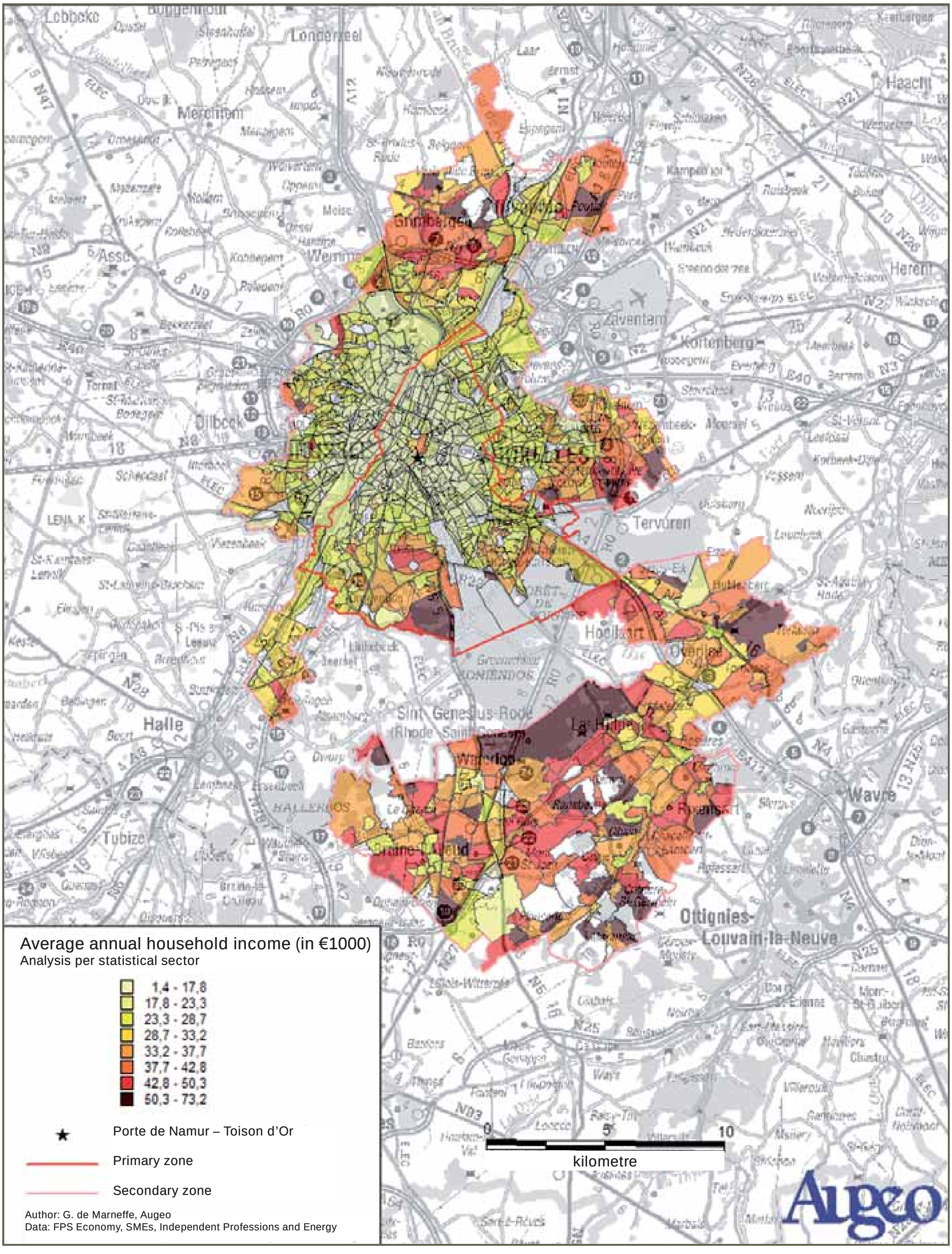
Map 05 - Standard of living in the effective market radius of the Westland Shopping Centre



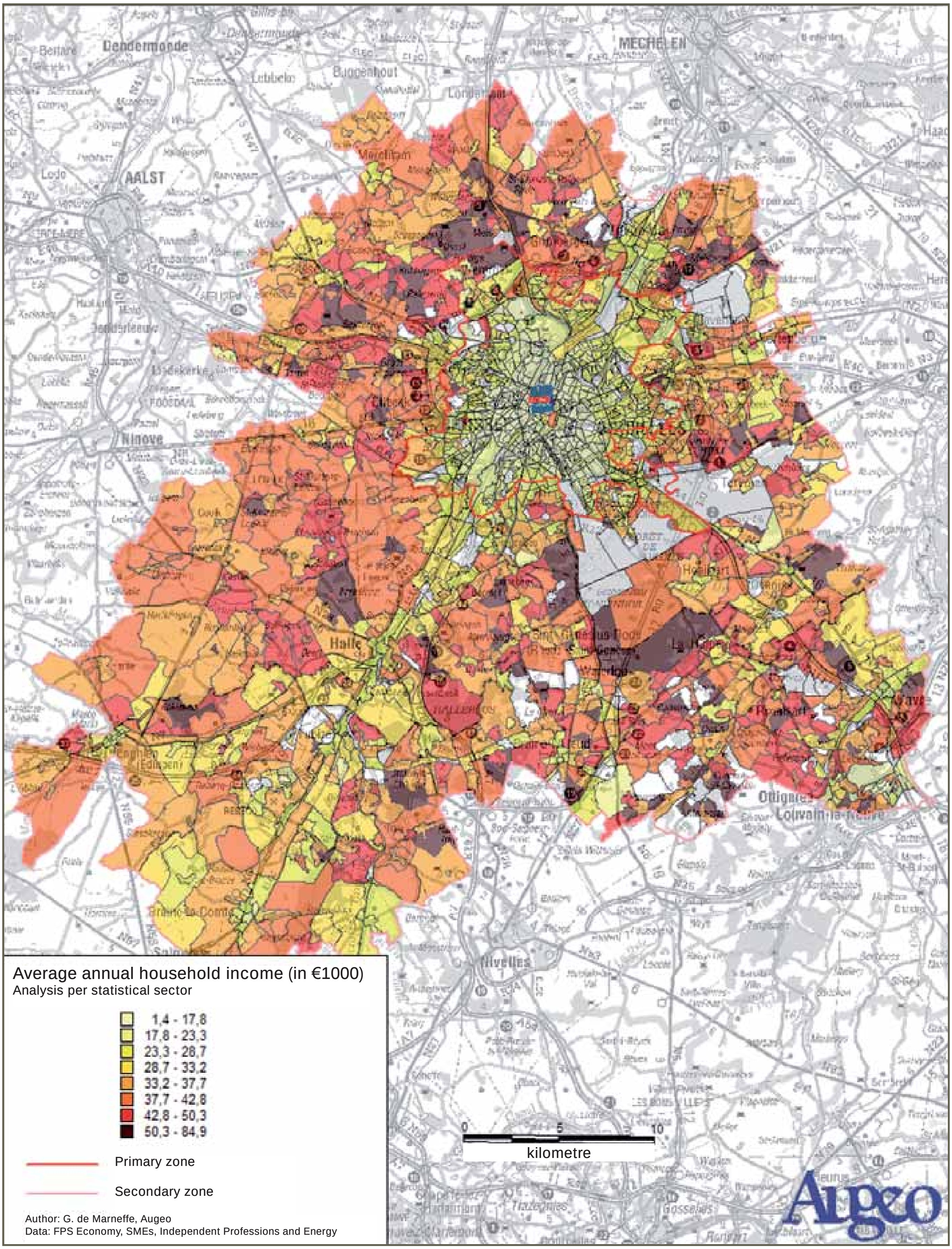
Map 06 - Standard of living in the effective market radius of the Louise centre



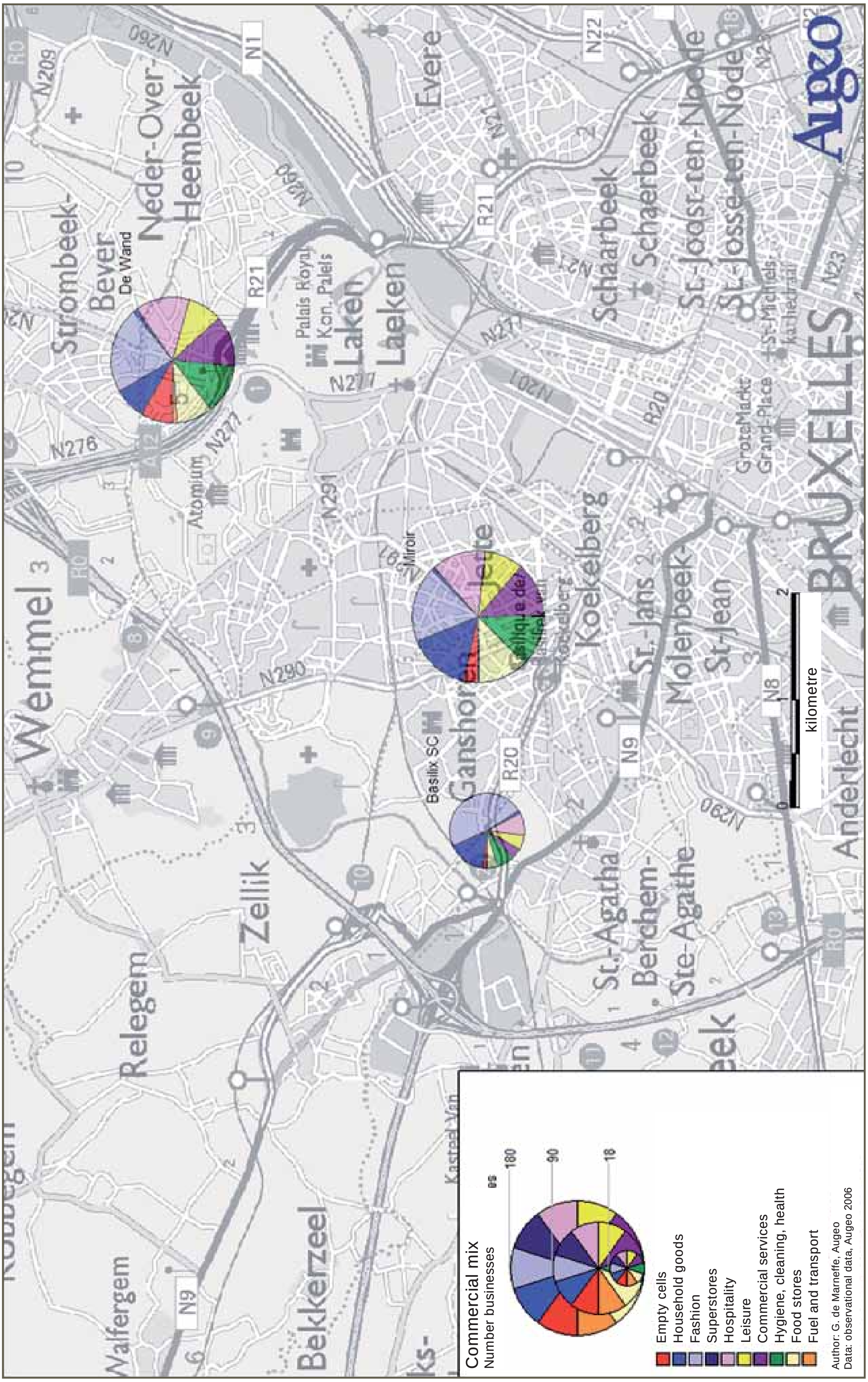
Map 07 - Standard of living in the effective market radius of the Porte de Namur

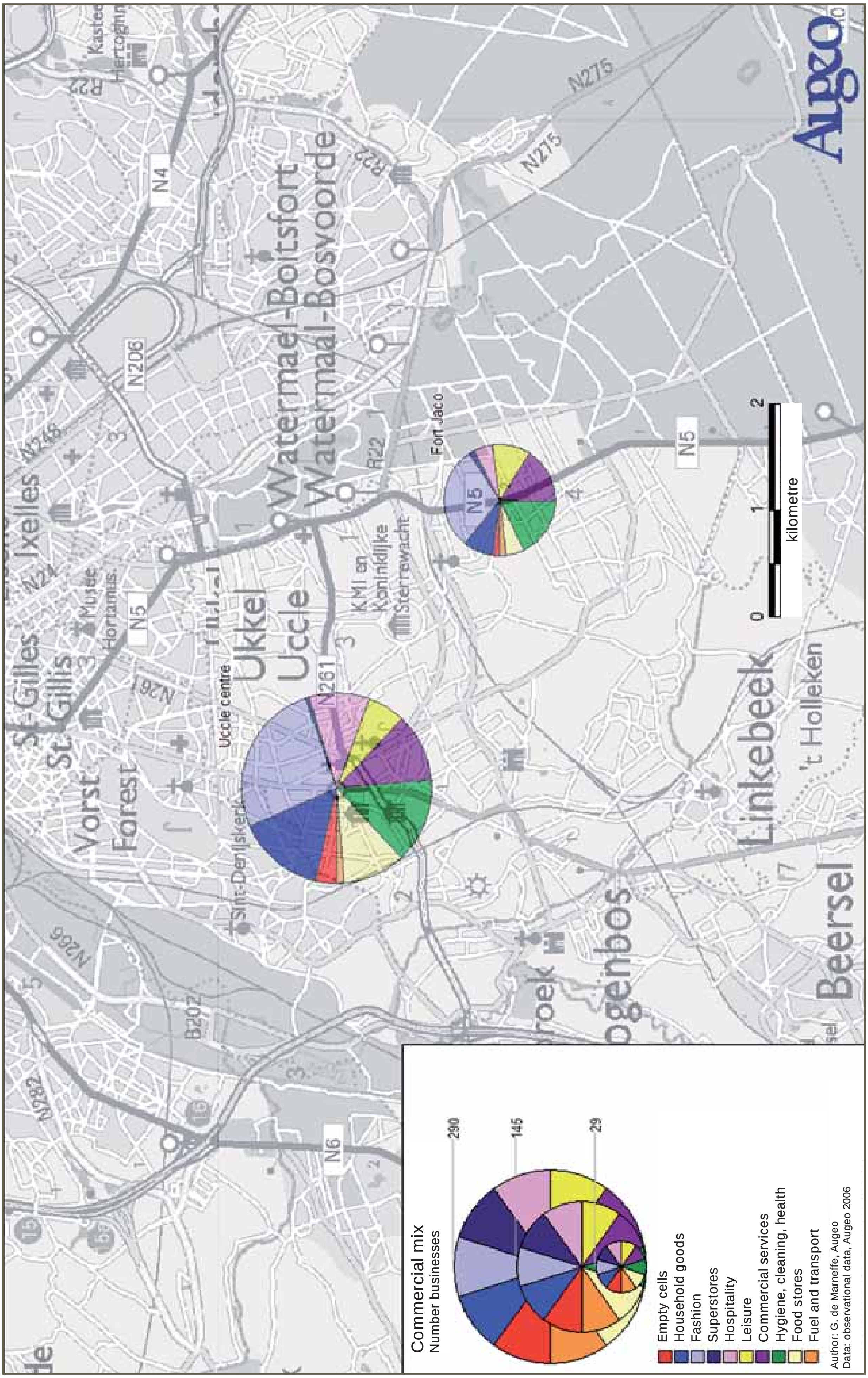


Map 08 - Standard of living in the effective market radius of the Rue Neuve – City 2 centre

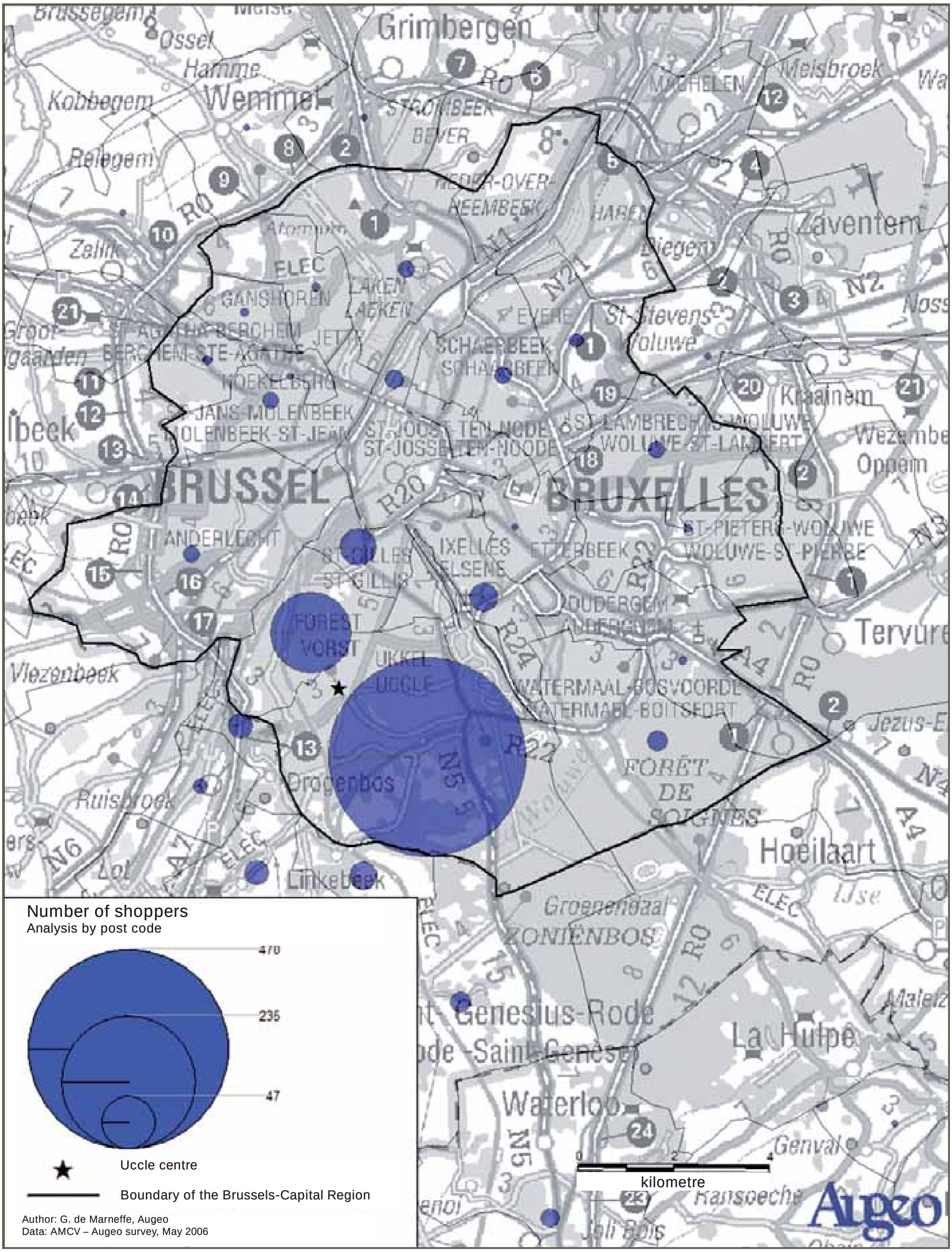


Map 09 - Commercial mix of Basilix SC, Miroir and De Wand centres

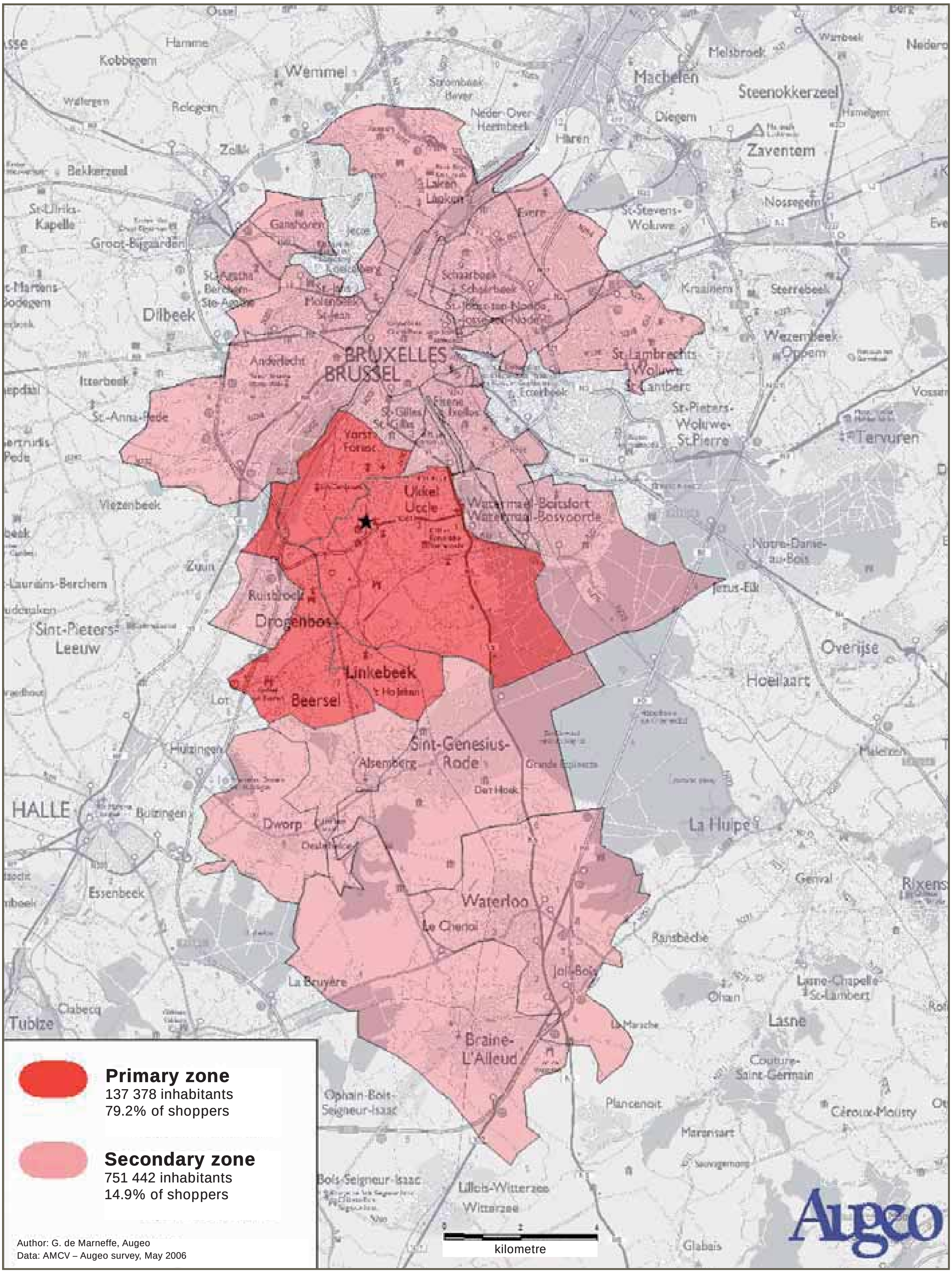



Commercial mix
Number businesses
290
145
29
Empty cells
Household goods
Fashion
Superstores
Hospitality
Leisure
Commercial services
Hygiene, cleaning, health
Food stores
Fuel and transport
Author: G. de Marneffe, Augeo
Data: observational data, Augeo 2006
Uccle centre
Fort Jaco
kilometre
0
1
2
Ukkel
Uccle
Watermael-Boitsfort
Watermaal-Bosvoorde
Ixelles
Vorst
Forest
Linkebeek
't Holleken
Beersel
KMI en
Koninklijke
Sterrewacht
Sint-Denijskerk
Musée
Hortamus
Augeo

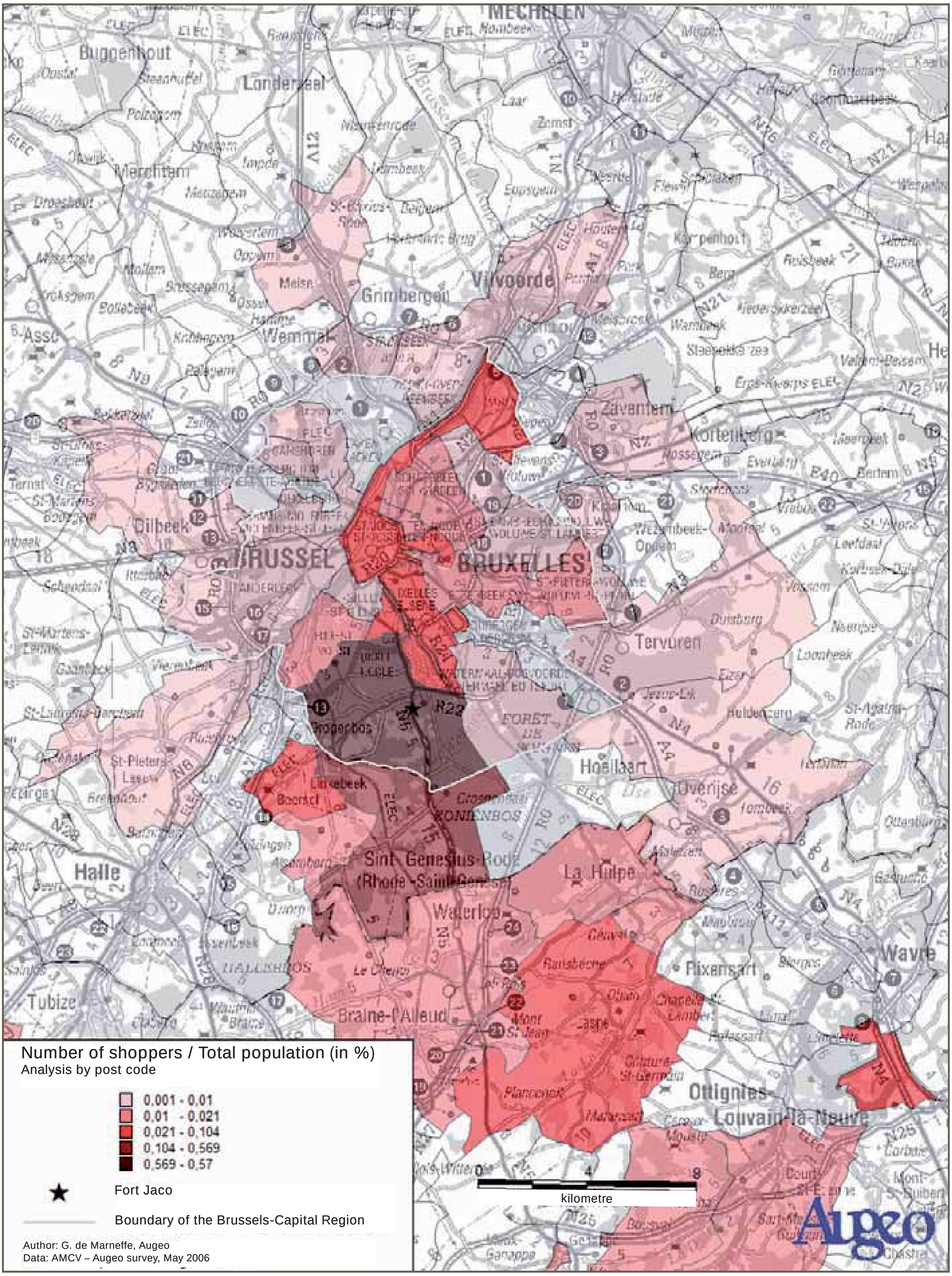
Map 11 - Distribution of shoppers in Uccle centre
Zoom on the Brussels-Capital Region



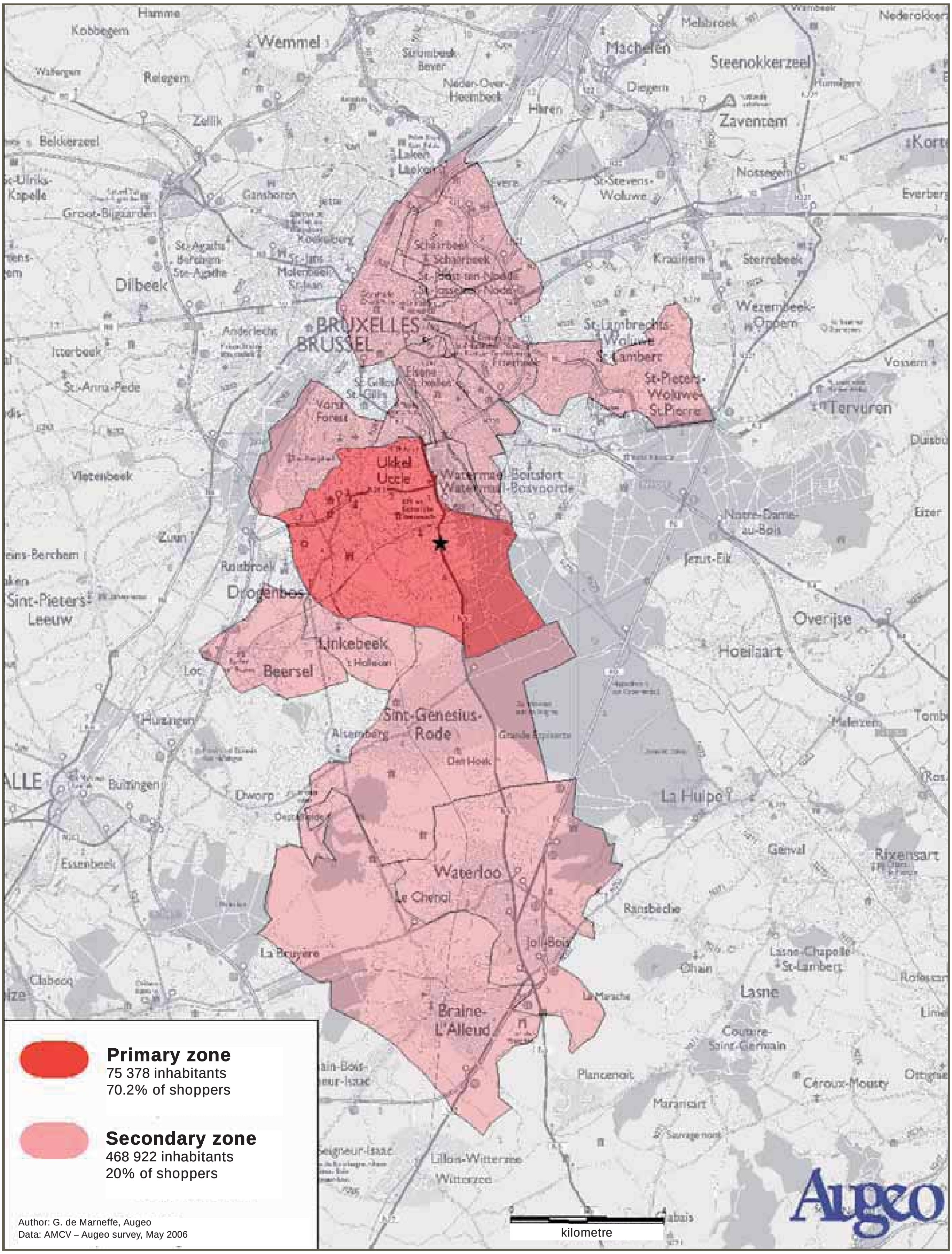
Map 12 - Effective trading zone of the Uccle centre shopping area



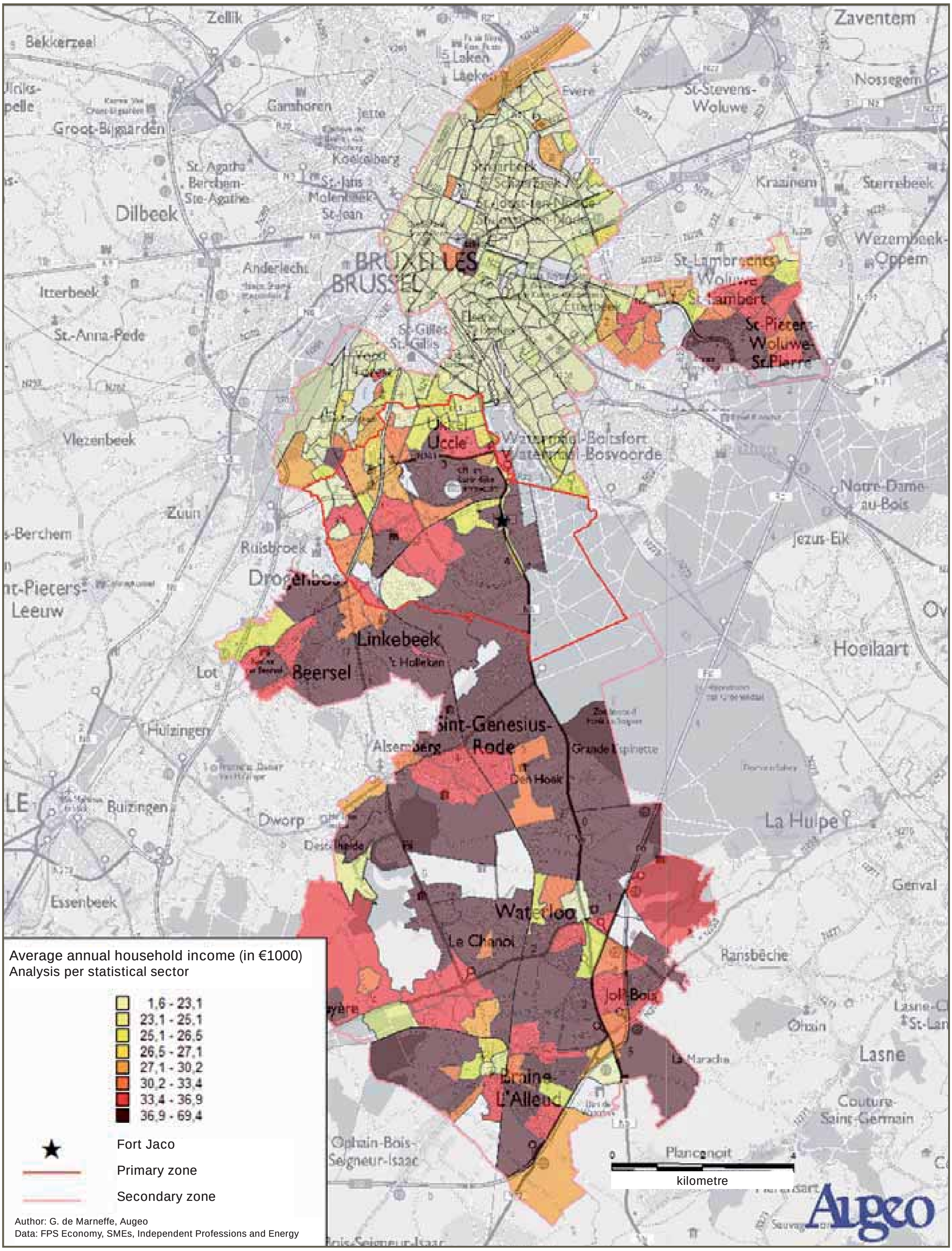
Map 13 - Influence of the Fort Jaco centre



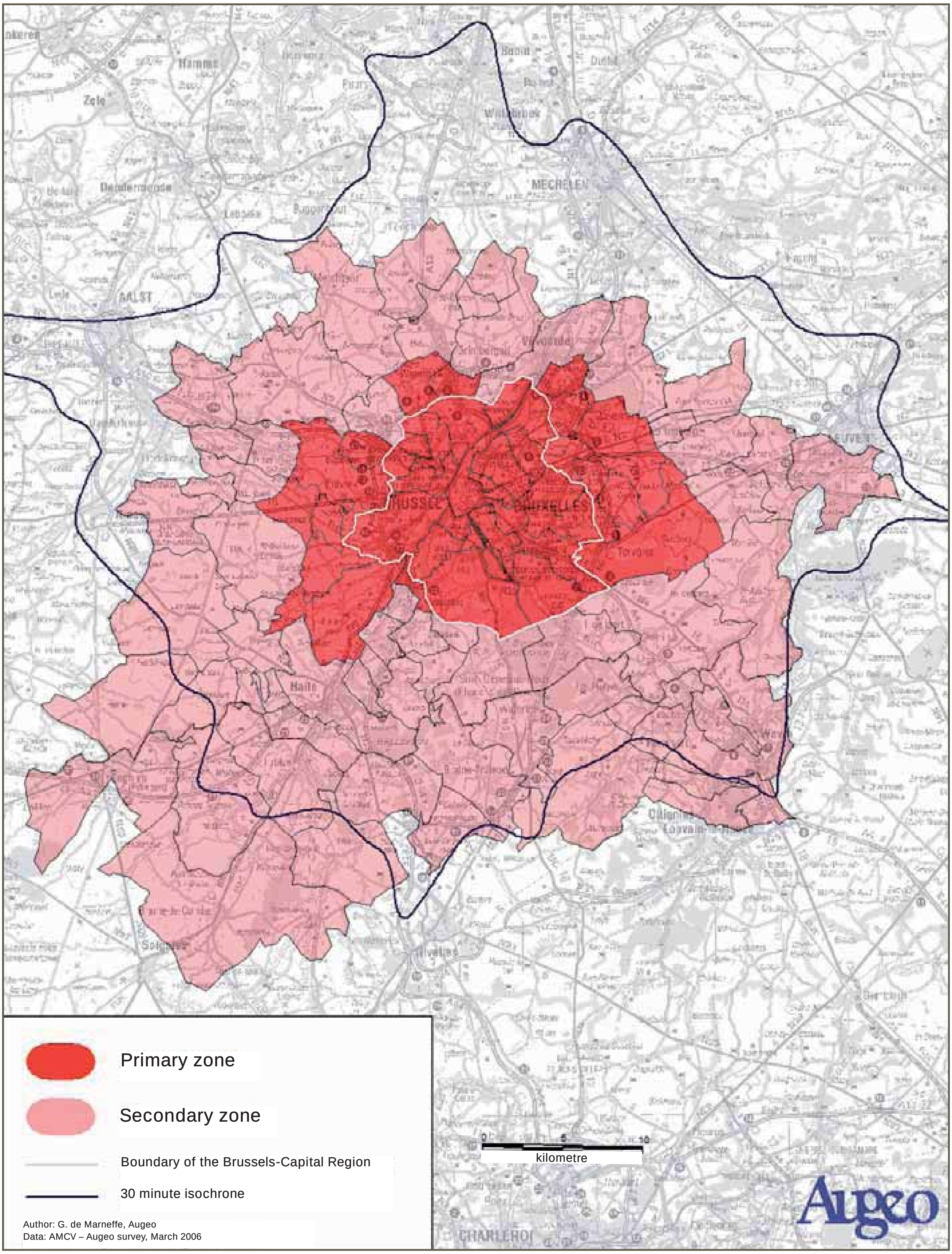
Map 14 - Effective trading zone of Fort Jaco



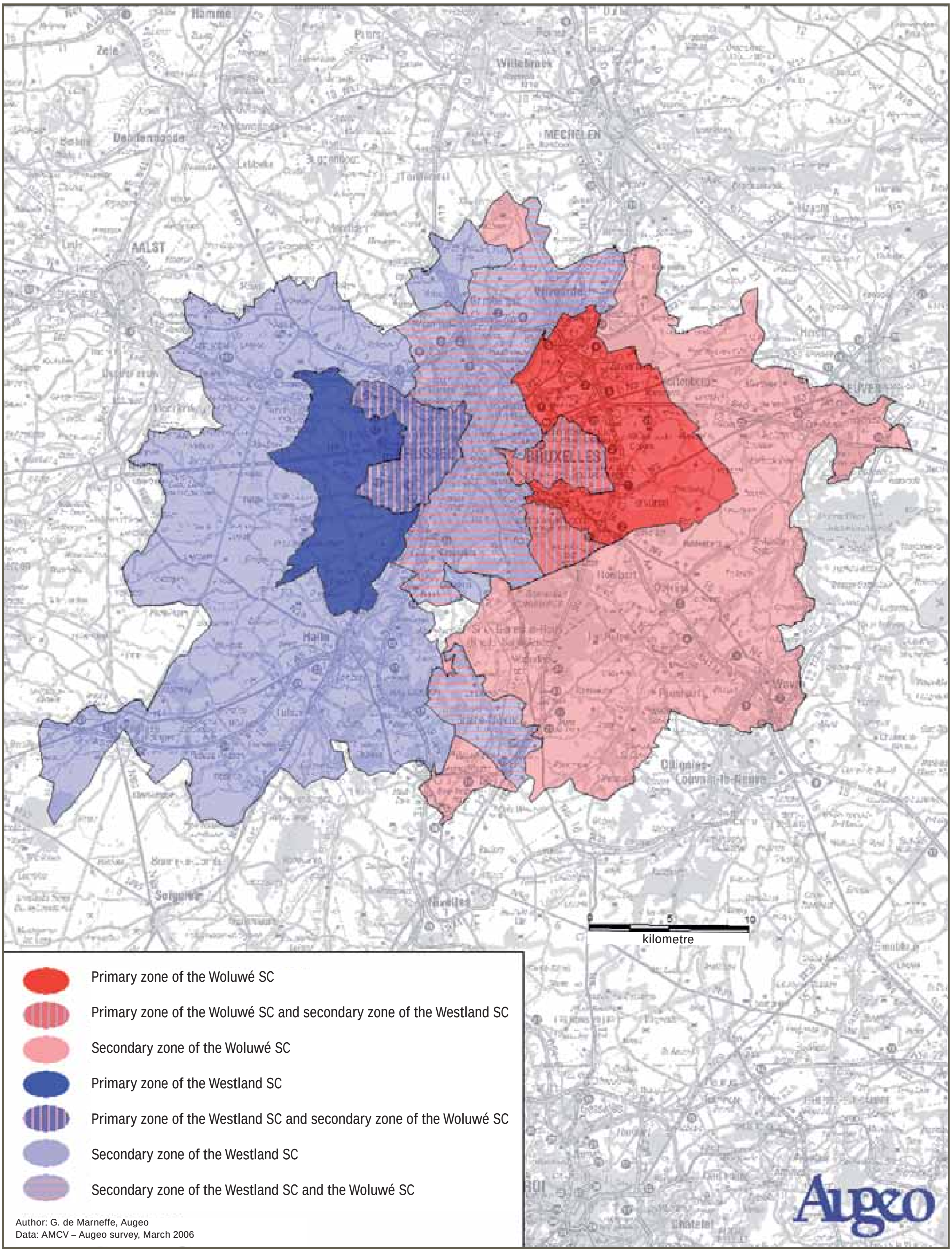
Map 15 - Standard of living in the effective market radius of Fort Jaco



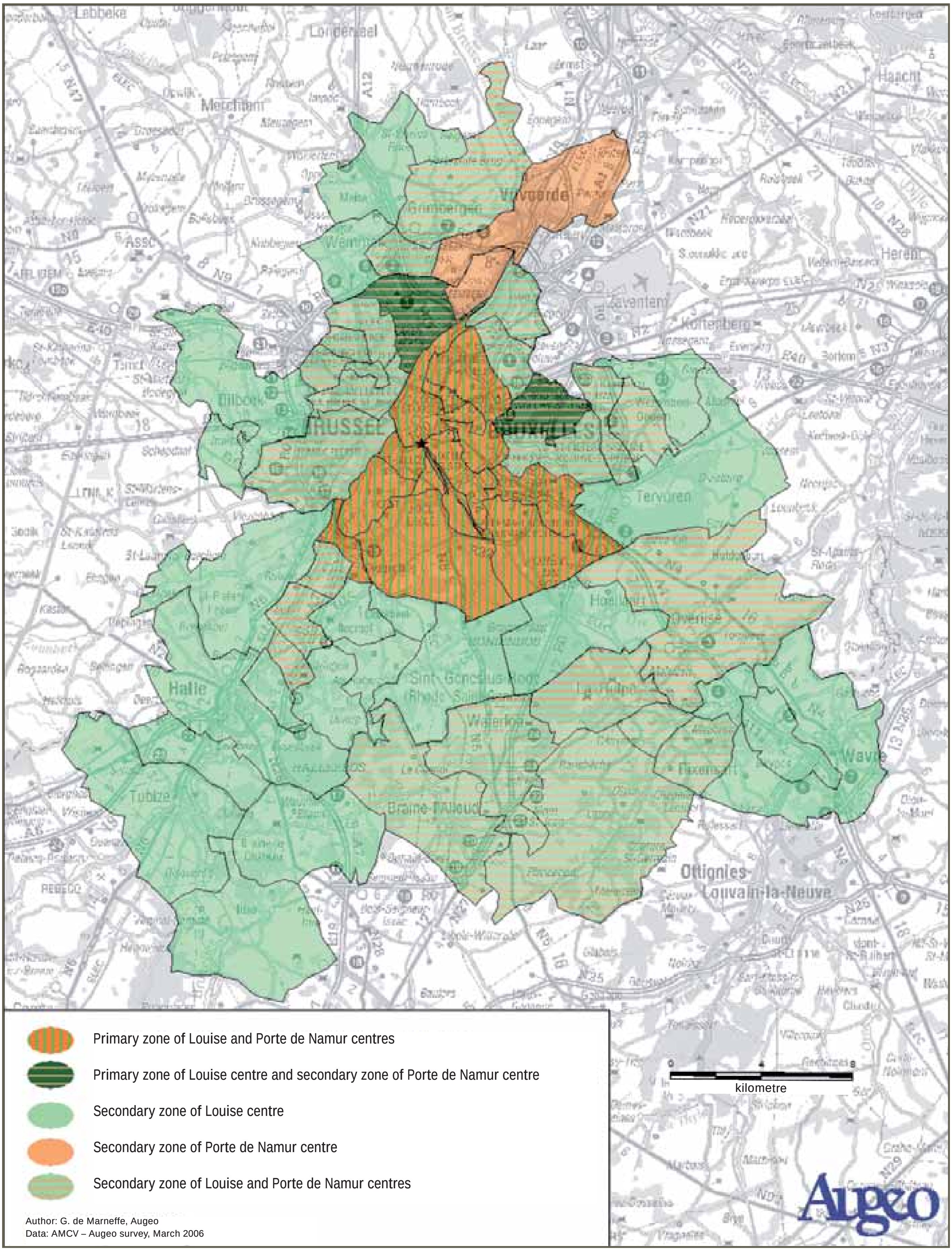
MAP 16 - EFFECTIVE MARKET RADIUS OF THE FIVE REGIONAL CENTRES



Map 17 - Effective market radius of the Woluwé and Westland Shopping Centres

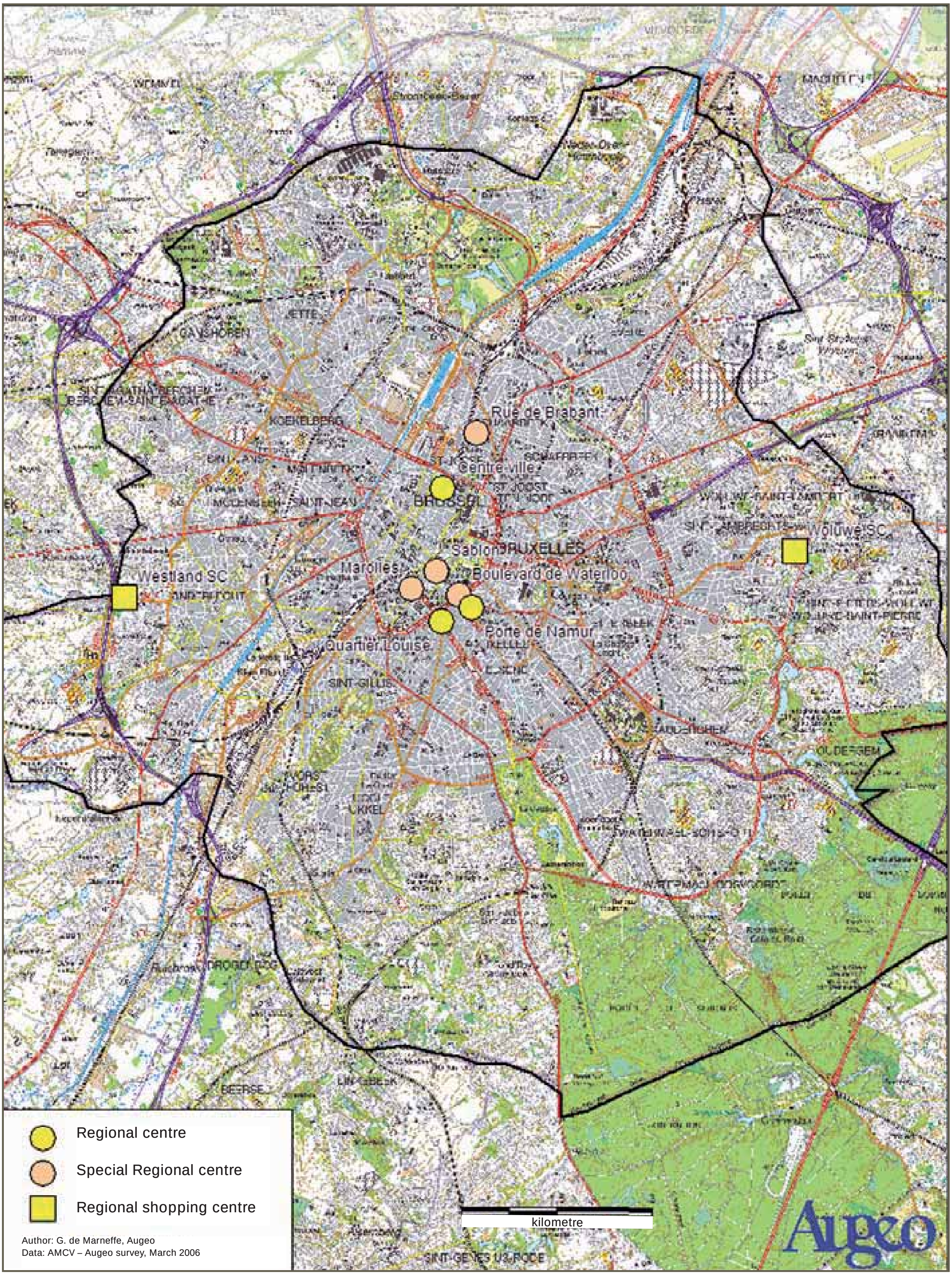


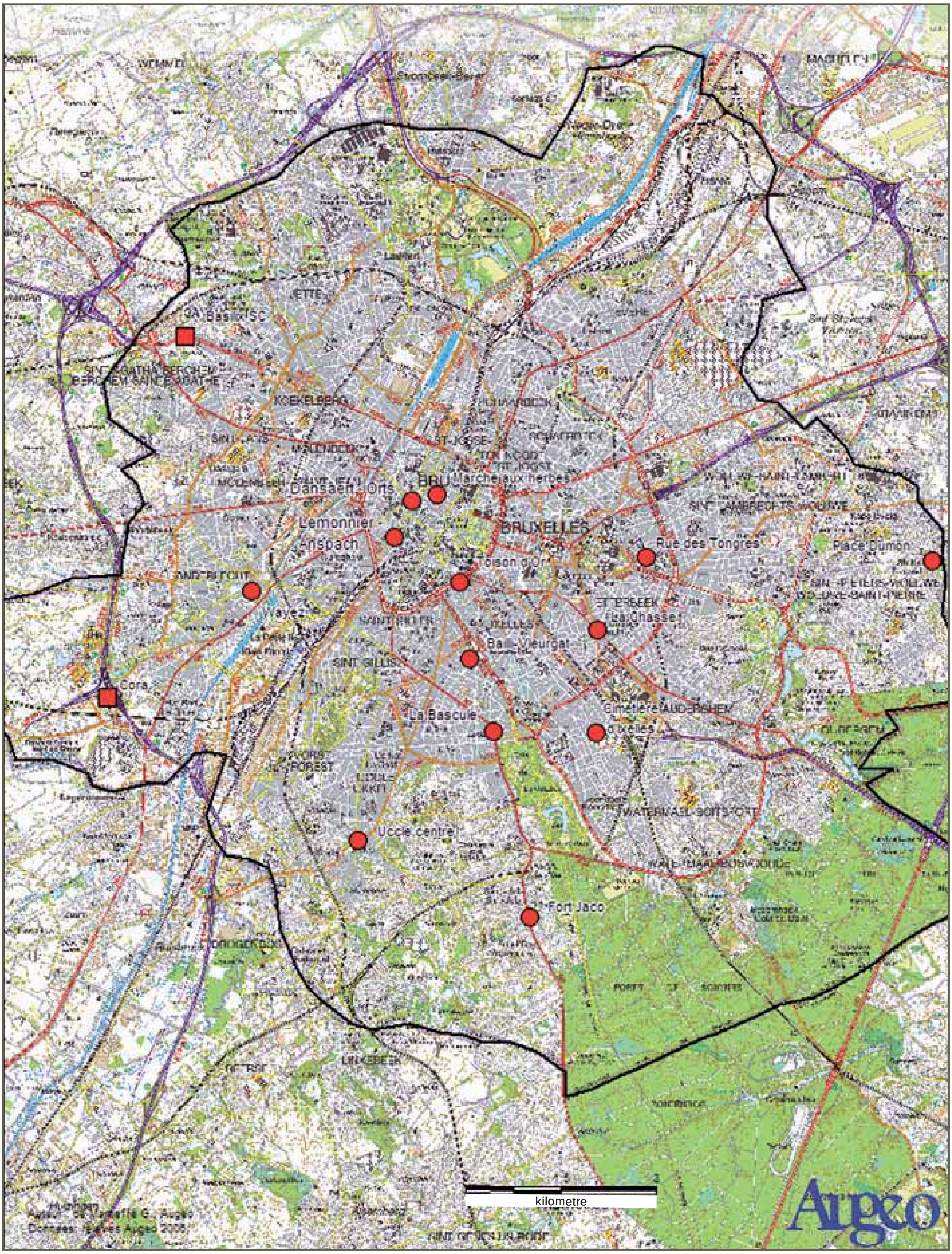
Map 18 - Effective market radius of Louise and Porte de Namur centres



Author: G. de Marneffe, Augeo
Data: AMCV – Augeo survey, March 2006

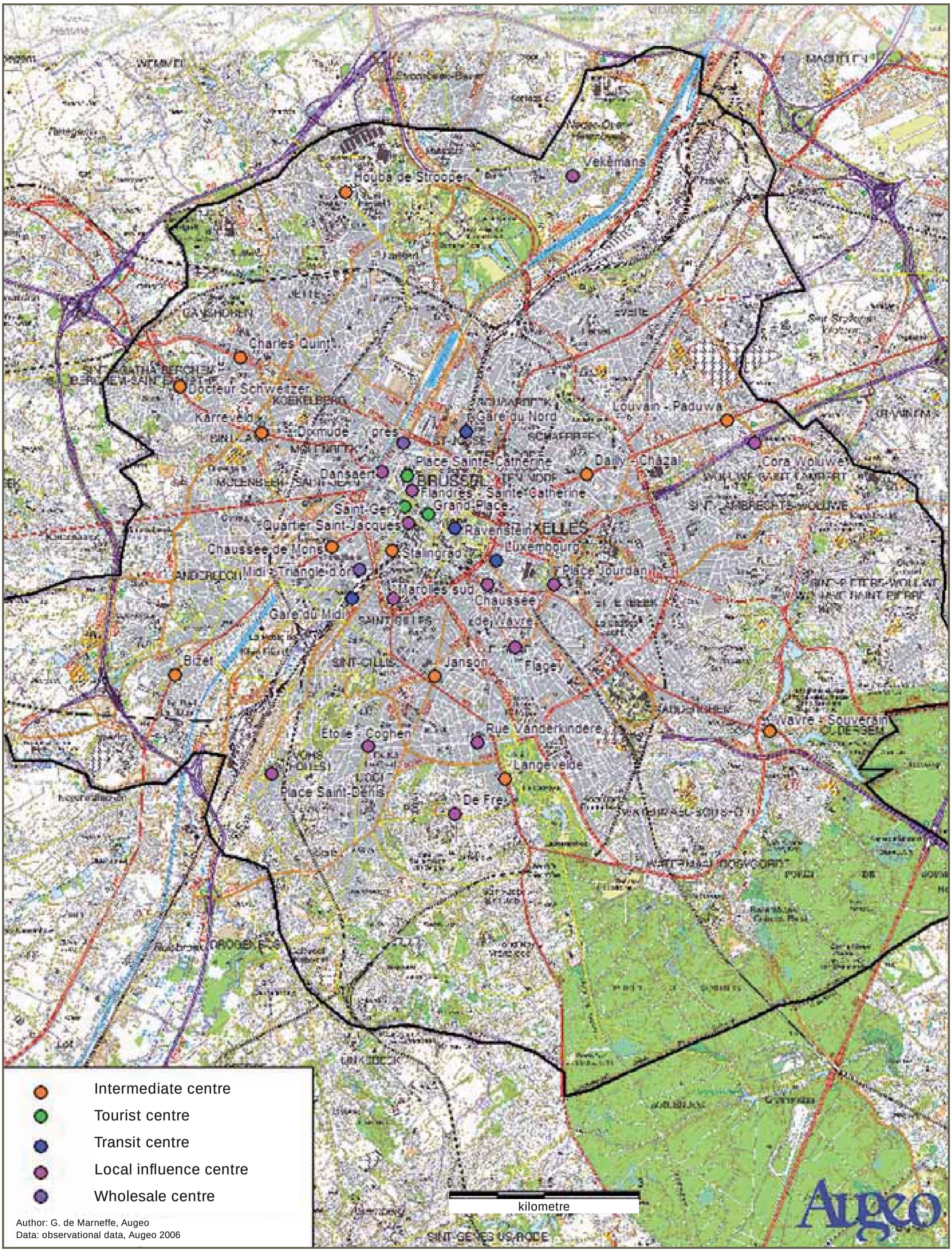
Map 19 - Regional centres




Basilix SC
Cora
Dansaert - Orts
Marché aux herbes
Lemonnier
Anspach
BRUXELLES
Toison d'Or
Rue des Tongres
Place Dumon
La Chasse
Wayez
Bailli-Vleurgat
La Bascule
Uccle centre
Fort Jaco
kilometre
Argeo

Map 21 - Intermediate centres

Map 22 - Special centres



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