Catchment
Competition
Character
Choice
Convenience

The Smaller Towns Report
Delivering retail-led renaissance
in towns and smaller cities: 2004

BCSC

UCL

Contents

Foreword

Shopping is an activity that affects all our daily lives, 5% of the UK population are directly employed in retail, and a high quality shopping environment can contribute significantly to everyone's quality of life.

In the first report of the BCSC Urban Task Force in 2002 we successfully brought attention to the major role that retail could and must play in the delivery of urban regeneration. Our major cities are now starting to see the emergence of world-class shopping and mixed-use development.

The improvement of the quality of our smaller towns and cities now needs special emphasis as a key to ensure that the benefits of the urban agenda being brought forward in those major cities continues within the smaller towns and does not leave them at a greater disadvantage,

I am grateful to the Bartlett School of Planning for carrying out this study on our behalf and hope that it will contribute greatly to the process of urban regeneration across the UK.

Andrew Ogg
President BCSC

01

Diagnosis

The factors affecting the performance of towns and smaller cities can be understood in terms of the overarching national context and their individual local context.

The national context comprises:

- **The policy context** – key broad policy areas like urban regeneration, social inclusion objectives and environmental sustainability concerns, and more specific issues like disability access, that shape the prospects for smaller centres.
- **The socio-economic context** – long-term trends and change processes affecting the way town centres are used and the nature and intensity of consumer demand.
- **The market context** – changes in the retail industry and the way people shop, like the popularity of out-of-town shopping, concentration of retail investment in larger centres and the loss of individual high street identities which are having a significant impact on smaller retail centres.
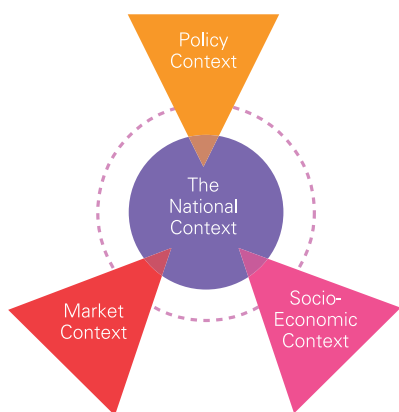

National context

The local context comprises five key issues – the five 'C's – which define the relative success or failure of individual town centres:

- **Competition** – smaller centres have to compete externally for trade against the attractions of other town and city centres and out-of-town retailing; they also have to compete to attract investment.
- **Catchment** – the economic position and social condition of the area a centre serves, which largely defines the scale and type of retail provision that is financially viable.
- **Character** – the physical environment of the town centre and its image or perception which makes it attractive, or not, to shoppers.
- **Choice** – the range and quality of the retail offer and the mix of uses available within the centre.
- **Convenience** – the ease with which shoppers can reach and move around the centre, by a variety of means of transport.

It is the combination or 'mix' of these factors which defines the form and function of a town centre and the actions which are appropriate to enable it to perform more effectively. The town centre 'mix' varies from place to place, and the challenge is to find the best set of remedies for an individual centre.
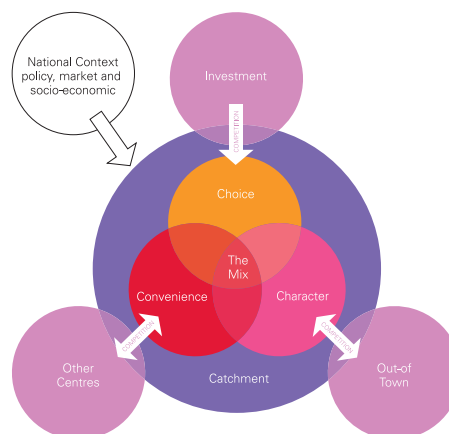
Local context

Remedies

Local authorities and others can alter the town centre mix to improve its attractiveness for shoppers, and ultimately for investors. Drawing from the research, fifteen remedies are offered below as a focus through which this re-investment can start:

1. **Resist out-of-town development** – Maintaining control over out-of-town retail development is fundamental if towns and smaller cities are to thrive. This is primarily a policy issue and, although government policy has been successful, further support to promote town centre vitality and viability is needed, particularly to restrict the sale of 'town centre' goods out-of-town and to control development of mezzanine floors. Consideration should also be given to how to allow town centres to operate on a more level playing field with out-of-town retail in respect of business rates and parking charges. There is a role for local authorities to maintain their resistance to out-of-town development that will compete head-on with their town centre offer, and they should use all means at their disposal to promote their town centre retail opportunities.

2. **Differentiate to survive** – Fundamentally, the opportunities available to towns and smaller cities will be of their own making, based on a local view of how they wish to differentiate themselves from their competition. Not every centre can be the prime destination for comparison shopping, and it is for local authorities to define, realistically, what the role of their local centres is, and to plan accordingly. This report suggests a framework to enable local authorities to do

this based on an understanding of their town centre product mix (the five 'C's of competition, catchment, character, convenience and choice).

3. **Take a regional view** – An emphasis on town centre differentiation also requires a regional view which has implications for the retail hierarchy and emerging Regional Spatial Strategies. Serious consideration should be given at this level to the functions of smaller centres, and to any re-balancing of the retail hierarchy that may be required over time. Such a strategy may require placing limits on the growth of some larger centres so that smaller centres have the opportunity to develop. A more creative approach to categorising centres is needed, which goes beyond basic retail function and takes account of the differentiation strategies of individual centres.

4. **Be proactive and flexible** – Realising such a differentiation strategy will not be a straightforward or speedy process, and will need local authorities to work proactively to ensure it is delivered. Local Authorities should use all means at their disposal, particularly their ability to identify suitable sites for development, to assemble land, and to prepare development briefs and masterplans, but should also be prepared to be flexible when unplanned opportunities arise.

5. **Develop the catchment** – Inevitably this will be a long-term agenda, during which local authorities and their development partners will have to engage in the long-term regeneration and development planning processes. However, it is important that the connection is made between the health of a town or city centre and its catchment, as both rely on each other to thrive. Aiming to raise the socio-economic profile of a centre's catchment and its overall population through new house building will, over time, help to raise the demand for high quality retail development. Conversely, having an attractive town centre and a critical mass of retailing is an important element of the package needed to attract new employers to a town.

6. **Form a public transport partnership** – The success of any town or city centre is also likely to be determined by its ease of access by public transport. Engaging with the local transport planning process will be vital in order to ensure that plans are in place to improve provision where this is required. This will require a partnership of interests between local and highways/transport authorities, and between transport providers and town centre managers. It will require strategies that recognise that shoppers may have different demands and patterns of use to other users, and that these should be catered for within the planning process.

7. **Develop a parking strategy** – Hand-in-hand with good quality public transport is the need for adequate, convenient, high quality and preferably free parking. This requirement came

through repeatedly during the research, and is viewed currently as a major competitive disadvantage of towns and smaller city centres when compared with out of town developments. Local authorities should think carefully about the revenue generated by parking and balance this against the possible increases in revenue if a town centre and its catchment are given the opportunity to thrive.

8. **Instigate BIDs** – Many smaller centres have active town centre management schemes in place, and indeed this is now viewed as one of the very basic requirements if towns and smaller city centres wish to survive. However, in view of the new funding and management opportunities presented by legislation allowing the setting up of BIDs (Business Improvement Districts), which larger cities are taking up, it is vital that smaller centres move quickly on this front if they do not wish to be further disadvantaged.

9. **Invest in the public realm** – The quality of the public realm is a key dimension of good town centre management that is also critical to the attractiveness of towns and smaller cities as a place to spend time and shop. Authorities should be aware that the quality, cleanliness and perceived safety of public spaces are amongst the top priorities of shoppers, and are factors on which their performance will be directly judged by their electorate. This requires high quality and robust soft and hard landscaping, ongoing investment in public space management, and high profile measures to crack down on anti-social behaviour when and if it occurs.

10. **Add value through design** – Designing the public realm to last adds value in the very real sense that landscape and street furniture stand up to everyday wear and tear better and will not need to be replaced so often. The design of new development can also add value by creating, or sensitively extending, the network of public spaces, or simply by infilling in a way that recognises the historic character and quality of a town or city that may differentiate it from another. Although the temptation may be to accept any development rather than none at all, this short-term view may simply exacerbate long-term malaise by failing to address negative perceptions about particular centres. Any new development is an opportunity to turn these perceptions around. High quality design can be the medium.

11. **Take the heritage dividend** – The presence of historic buildings and public spaces may bring with them additional costs and space restrictions. However, like high quality design, the value they add to help differentiate a town or smaller city centre will be invaluable. Every effort should therefore be made to integrate high quality historic buildings, and local authorities should be active in seeking out gap funding opportunities to bring their historic stock up to contemporary standards, including for access. The

equalisation of VAT on new-build and refurbishment would also encourage re-use of historic buildings.

12. **Promote mixed use** – Perhaps the major benefit of traditional centres is the variety of uses, amenities and facilities they offer. This is particularly the case in smaller centres which are inevitably more compact than larger ones. Local authorities should purposely pursue mixed-use development, by aiming to provide leisure, work and residential facilities alongside new retail uses. Less onerous Section 106 requirements may be the price to be paid for attracting the right developments, but this will be a price worth paying if the overall vitality of the centre is maintained. The private sector needs to be more flexible in finding ways of funding mixed-use development and Government funding should be made available where this is not viable.

13. **Plan to manage displacement** – New development may also have the unintended consequence that it displaces the traditional focus of retail activity in a town centre. Again this may be a price worth paying for re-investment, although the negative impact of such a change can be overcome if the right measures are put in place early enough to plan for the change. This may require the re-thinking of certain areas to fulfil new functions, including evening leisure to replace daytime shopping.

14. **Engage with retailers** – Attracting suitable retailers to towns and smaller cities may also require a long-term process, in this case, of engagement with developers, investors and retailers in order to establish their priorities and requirements. All key decision-making should involve key private sector stakeholders to ensure that market requirements are being met and that local strategies are realistic about what can be achieved.

15. **Develop an independent retailer strategy** – However, local authorities should not restrict their interest to the multiples, particularly when it is often the smaller independent retailers that give smaller centres their unique character and draw. Developing an independent retailer strategy will engage the interest, support and aspirations of this part of the market, will ensure that their needs are considered when major development is planned, and will further differentiate the retail offer.

Prescription

The research has shown that retail-led development can produce outcomes affecting a town's competitive position, the nature of its catchment, its physical character, the choice offered to consumers, and how convenient it is for access. The main body of the report includes examples of how real towns and cities are approaching these challenges, and how, by getting the particular mix right in each place, they are able to shape more vital and viable town and city centres for the future.

Finally, this requires a strong and explicit vision that brings together an understanding of the core issues affecting the centre and identifies the actions to be taken. It necessitates:
- **vision definition**, understanding the individual 'mix' of issues (competition, catchment, character, choice and convenience) and opportunities affecting a centre;
- **vision expression**, communicating the vision, but with stakeholder engagement being essential to the process;
- **vision implementation**, through a variety of specific tools identified in this research, and through the determination and willingness of public and private stakeholders to invest time, skills and resources in delivering a retail-led renaissance.

At each of these stages it is incumbent upon local authorities to work with the retail industry and vice versa, so that both understand each other's aspirations and constraints. The public sector needs to understand the commercial realities of investment decisions, just as the private sector partners need to understand how their investment know-how and priorities can fit within a larger local vision for towns and smaller cities.

In partnership, real progress can be made; without it energy, resources and, above all, the potential of towns and smaller cities will continue to go to waste. Not everywhere can have the biggest and the best shopping facilities, but everywhere can be the best that it possibly can be, given its unique local context and place within the retail hierarchy. A little bit of retail therapy may be all that is required.
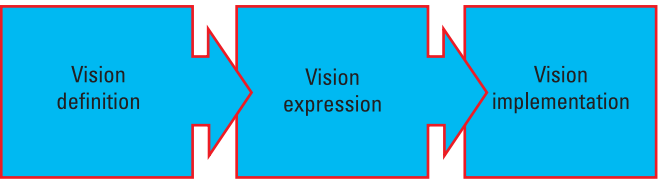
1.0 Introduction

1.1 The research

Government policy since the mid-1990s has concentrated on promoting vital and viable town centres, by directing retail development away from out-of-town locations towards town centres. Many major UK cities are already undertaking massive retail redevelopment which is acting as a catalyst for regeneration and changing attitudes to these cities. They have found retail investment can help to build confidence that city-wide renaissance is possible.

However, there is now a concern that retail development is becoming over-concentrated in a few large centres, and that consequently there is a need to re-balance the retail hierarchy to achieve social inclusion, regeneration and sustainability objectives elsewhere. The challenge for smaller centres is to understand how this retail-led approach to urban renaissance can be delivered lower down the retail hierarchy.

This research was commissioned in response to this challenge. It aims to establish the issues underlying the relative performance of towns and smaller cities and their ability to serve the needs of their local catchment areas. It identifies the approaches, solutions and best practice that have enabled towns and smaller cities to thrive and develop their retail offer.

The report is based upon a literature review and responses to questionnaires sent to BCSC members and 200 local authorities in towns and smaller cities around the UK (defined as those centres ranked 51-250 by Experian – see Annex 3). Five detailed case studies were also undertaken, and a wide range of experts from across the retail and planning sectors were interviewed.

1.2 The report structure – some retail therapy

What emerged is that although a genuine retail renaissance in many towns and smaller cities will take time, in different combinations and to different degrees, many of the ailments affecting town centres are shared; as are many of the cures. Retail therapy is therefore dispensed in the remainder of this report as follows:

- **Diagnosis** (Chapter 2), offering an examination of the ailments facing towns and smaller cities.
- **Remedies** (Chapters 3 to 7), providing a detailed discussion of the range of retail-led remedies uncovered during the research.
- **Prescription** (Chapter 8), bringing the remedies together to offer some overarching conclusions.

1.3 The intended audience

This report is intended to provide insights for both the public and the private sector interested in promoting and enhancing the performance of individual town centres as part of a retail-led urban regeneration process. It will be of particular interest to planners, urban managers, councillors, retailers, developers and investors, as well as to their consultant teams.

Some readers might find it useful to read the report in its entirety; others may simply wish to dip in to extract ideas concerning their own particular areas of interest. It is nevertheless recommended that all readers read the diagnosis in Chapter 2 in order to understand the interrelations between the different dimensions of successful retail-led regeneration.

Major centres are being regenerated and attracting investment: Birmingham
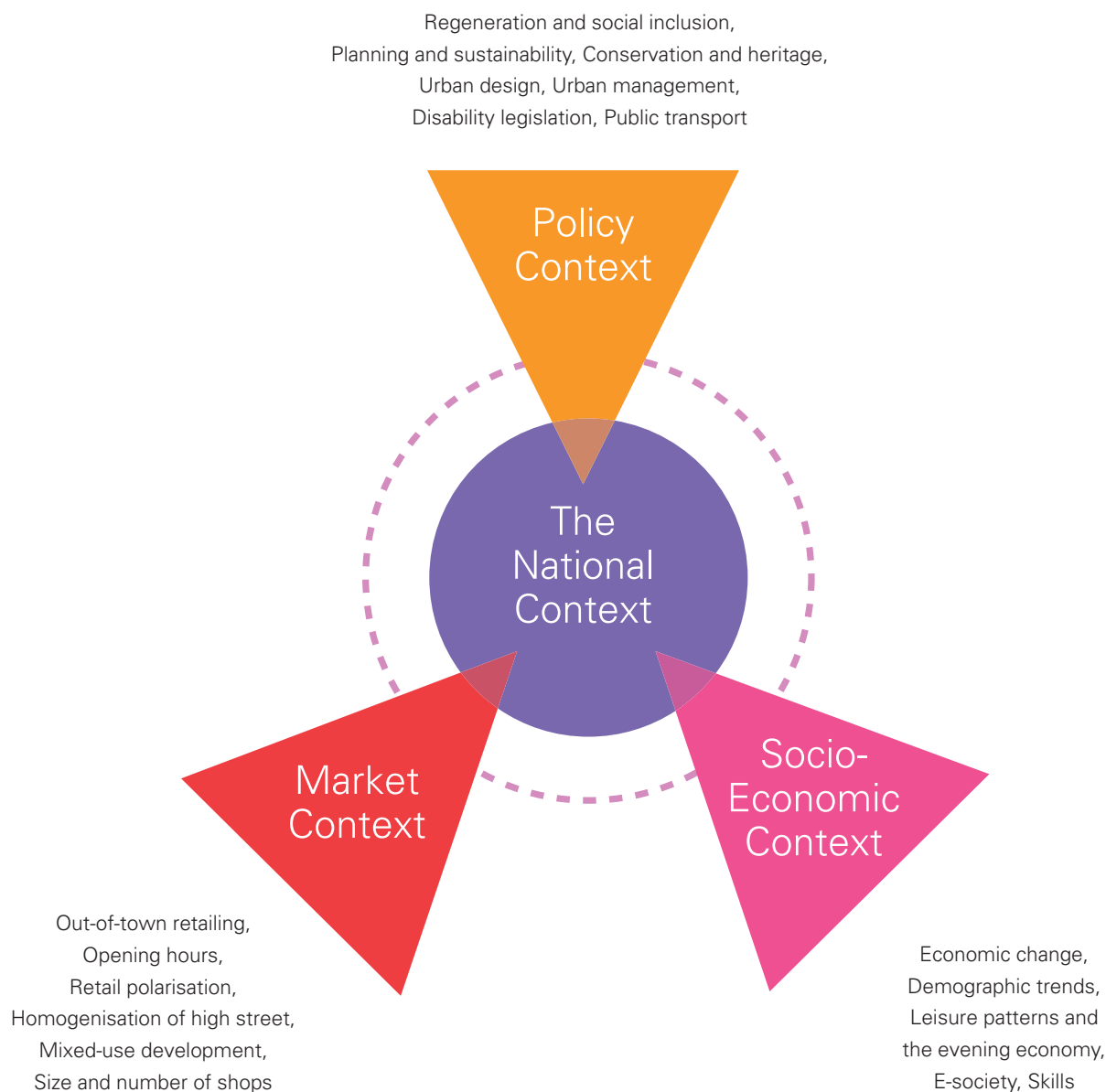
2.1 The national context

The review of the literature and research indicated that the performance of towns and smaller cities can be understood in terms of the national context within which retailing occurs. This in turn can be broken down into the policy, socio-economic and market contexts.

2.2 The policy context

What happens to smaller centres is conditioned by Government initiatives and policies in broad policy areas such as urban regeneration, but also in focussed areas such as disability access. All can have a major impact on local policy, aspirations and investment.

Urban regeneration and social inclusion

Retail's contribution to regeneration has traditionally been seen primarily in economic terms through direct employment and indirectly through local multiplier effects; although evidence conflicts and the case for net benefits is not yet proven. The Government does not, in the past, appear to have viewed retail as a major regeneration force, and it has even been seen as a threat to regeneration aims. The Urban Task Force Report and the subsequent Urban White Paper, for example, refer only to the negative impacts of retail development.

Regeneration and social inclusion,
Planning and sustainability, Conservation and heritage,
Urban design, Urban management,
Disability legislation, Public transport

Policy Context

The National Context

Market Context

Socio-Economic Context

Out-of-town retailing,
Opening hours,
Retail polarisation,
Homogenisation of high street,
Mixed-use development,
Size and number of shops

Economic change,
Demographic trends,
Leisure patterns and
the evening economy,
E-society, Skills

In response to this BCSC established its own Urban Task Force in 2002 which, in consultation with CABE and English Heritage, commissioned and produced the design guide *Urban Design for Retail Environments*. This illustrated the role retail could, and needed to, play in regeneration strategies.

There are indications that the Government's attitude to retail is now changing. In January 2003, following the McKinsey Report into UK productivity, the DTI established the Retail Strategy Group to identify the key issues that impact on the competitiveness and productivity of the retail sector. Their report *Driving Change (2004)* identified four key issues: crime, property (lease agreements), planning and the cost of compliance. On planning the report stressed the need for the retail sector to engage in the new regional focus and expressed concern about the lack of knowledge and understanding of the role, contribution and needs of the sector. The RSG commissioned a further report from DTZ Peida Consulting, *The Retail Development Process and Land Assembly,* which concluded that "In-town retail schemes are now more than just shopping centres. They are widely viewed as one of the keys to regeneration, providing opportunities to re-brand towns, create quality public space, diversify the leisure offer and help sustain a whole host of other town centre initiatives, including housing and transport."

The ODPM (Office of the Deputy Prime Minister) is also taking a more active interest in the retail sector, particularly in terms of measures to direct retail development towards town centres and the issue of retail provision in deprived areas. Recently, for example, they have commissioned research on strategies for smaller centres and   on retail opportunities in England's deprived neighbourhoods, based on identification of untapped demand - areas where high proportions of expenditure are 'lost' to other centres. Both projects have yet to report but their commissioning indicates that although most of the interest has so far focussed on larger cities, the policy focus on retail as an urban regeneration tool is now beginning to include smaller centres. The challenge is to find approaches that can address the specific concerns of those centres.

Planning and sustainability
Planning Policy Guidance Note 1 (PPG 1) states that "a key role of the planning system is to enable the provision of homes and buildings, investment and jobs in a way which is consistent with the principles of sustainable development." This emphasis on environmental objectives, the use of previously developed land, conservation and, particularly, reducing the need to travel has positive implications for retail-led development in smaller centres.

The Planning and Compulsory Purchase Act, 2004, abolishes structure plans, local plans and unitary development plans and replaces them with Local Development Frameworks as part of a wider 'culture of change' in planning. The new Act envisages a more local, community-focused and proactive, rather than regulatory, role. Although viewed in general as positive for allowing land use planning to catch up with the urban regeneration agenda, the wholesale nature of the changes implied in the Act is causing some concern on the grounds that the skills to implement and operate the new system might not be available. This is likely to be a key issue in smaller local authorities, that in the main are responsible for the smaller town and city centres that this report addresses.

The consultation draft on *Planning Policy Statement 6 (PPS6): Planning for Town Centres* makes specific mention of regeneration and social inclusion objectives. Most significantly it mentions providing for consumer choice and accommodating business models, which is widely thought to reintroduce a degree of uncertainty over the acceptability, or otherwise, of out-of-town development. On the other hand, it also confers a new responsibility to rebalance networks and hierarchies of centres to prevent over-domination by the largest centres, which will be particularly significant for towns and smaller cities.

Urban design
Design quality issues, whether at town centre, quarter, individual building or public realm level, have risen in importance significantly as a policy concern. Policy guidance on good design is now expected to guide local authority decision making on all significant developments.

However, a conflict exists between retailers' commercial and operational objectives and urban design aspirations. Retailers' preferences, as identified by BCSC (2002b), are for: large footplates; uniformity of store design; access by car and provision of car parking; a specific multiple tenant mix; security and shopping centre management standards; large catchment areas and critical mass. Whilst these are only preferences, and individual developers and retailers show varying levels of flexibility and willingness to compromise, they are not easily compatible with good urban design principles, as set out in government guidance (i.e. DETR / CABE, 2000). Given the physical limitations of smaller retail centres, they experience more acutely the conflicts between retailers' requirements and good design principles.

A recent report by CABE (2004) on lessons learnt from town centre retail projects in larger cities in England reviewed by their expert design panel recommended a range of design principles:

- **Permeability** is more important than faithfully replicating the historic grid pattern, as individual blocks may be too fine for retailers' needs.
- **Open street environments** should be retained wherever possible, and internal sections should be naturally lit, as short and as straight as possible, interspersed with external public spaces and not segregated with secured entrances.
- **Respect the building line** of the existing urban environment and maximise the amount of active frontage onto the street.
- **Providing more levels of shopping** - up to five storeys in high value locations, and using topography and connections from other sites to extend the strength of the offer over several levels.
- **The roof** needs to be considered as the fifth elevation, roof top car parking is rarely a good option, and roof top servicing should be minimised in favour of public or communal uses e.g. roof top gardens.
- **Movement hierarchy** of pedestrians first, then public transport, but still cars should be built into the masterplan. The relationship with public transport interchange can be the linchpin of success. Signage is important but legibility is about distinctiveness of the location and the use of landmark buildings, spaces and vistas. Wider pavements and narrow carriageways can be a better solution than pedestrianisation.
- **Public realm** – any new retail development should seek to enhance the network of public spaces by improving existing spaces and adding to them. A landscape architect should be appointed to the project team from the earliest stages and given significant status in the decision-making process. The aim should be to make each area distinctive but keep the overall strategy simple.

- **Mixing uses** – smaller retail units create activity at the ground floor level of residential blocks. Residential units like town houses can wrap 'big block' developments such as cinemas which would otherwise present large blank facades to the street.
- **Car parking** – adequate car parking has to be provided to compete with out-of-town developments. Underground parking is strongly encouraged. Multi-storey parking must be regarded as an architectural commission in its own right and could be combined with other uses.
- **Servicing** – should be kept separate from the customer environment.
- **The architectural response** Retail is 'big box' architecture – need to prevent it becoming 'black box' by: maximising the opportunity of the entrance; setting the box behind the historic shopping streets or; embracing the 'black box' but creating an architectural response that transcends. Smaller-scale infill developments in the context of an existing retail environment should not seek to mimic too literally the fine grained streets of earlier times.
- **Public art** attempts to be populist but pleases no one and dates very quickly. CABE supports employing an artist as part of the design team from day one, allowing the work to infuse the project rather than be considered in isolation.
- **Designing to manage** – designing-in the management regime from day one and integrating the approach not just focussing attention on the internal mall – either through informal partnership, through town centre management schemes or BIDs.

These principles reinforce those previously highlighted in BCSC's own report: *Urban Design for Retail Environments (2002).*

Conservation and heritage

Towns and smaller cities are less likely to have been affected by bomb damage during WWII, or subjected to wholesale redevelopment of the kind which prevailed in the 60s and 70s. As a result they tend to have larger numbers of historic buildings. This is both an advantage and a disadvantage as they might have retained their unique character, but will feel more acutely the problems of adapting the existing building stock and urban fabric to the requirements of contemporary retail activities.

Historic buildings may be subject to restrictions on development, alterations and their use, particularly if they are listed or within Conservation Areas. These buildings are generally more expensive to maintain and may be unsuited to modern business requirements. In addition, streets may be narrow and congested, with little open space and small plot sizes which make land assembly and development difficult. However, this is what constitutes the character, identity and uniqueness of a place, and English Heritage increasingly argues that it can provide the prime asset for marketing and regeneration.

Urban management

The application of shopping centre management standards to town centres through voluntary town centre management schemes has already had effects in terms of improving safety, cleaning, greening and marketing of town centres across the country. *The Local Government Bill (2003)* provides for the establishment of Business Improvement Districts (BIDs), which, will be funded through an additional levy on business rates, from 2005. BIDs will require the support of the majority of the local business community in order to be established and so may be able to bridge the partnership gap between retailers, of all sizes, and local authorities. As they become established across the country, BIDs are also likely to increase expenditure on place marketing, making it the norm rather than the exception.

The implication of these developments is that TCM- or BID-managed centres will increasingly set the standards for quality of public space and services and for marketing activities. It is likely that the competitiveness of smaller cities and towns in attracting retail-related investment will depend to a great extent on their ability to adopt and adapt those management approaches.

Transport and access

National policy has for some time promoted a switch from private to public modes of transport, although research consistently demonstrates the importance of good road access and parking provision for the long-term viability of retail centres. A balanced approach may therefore be required if town centres are to compete effectively and be sustainable. However, the Government has often been reluctant to commit funds to large-scale infrastructure projects such as Cross Rail or the Manchester tram extension which could benefit the smaller centres within large metropolitan areas. For its part, Network Rail is currently concentrating on operational and track repair issues and is unlikely to invest in network extensions for some time. The only real new source of funding for public transport improvements would therefore appear to be the implementation of congestion charging, although in Central London this has failed to produce the revenue levels originally anticipated.

The newly implemented requirement for all major developments to be supported by an access plan makes this a key issue for retail-led development, but as with so much else, smaller centres may be at a disadvantage here, in that their population tends to be more reliant on private transport, with public transport operators increasingly focussing their investment and interest on competing along main routes into the larger city centres.

Urban management

Bexley Council

Conservation and heritage

Transport and access

From October 2004 *The Disability Discrimination Act 1995* has required service providers to make reasonable adjustments to any physical barriers that may prevent disabled people using their services. This particularly affects older retail units which often house more marginal retail businesses. Given that these are likely to be in greater concentrations in towns and smaller cities, this poses a further special problem for these centres.

2.3 The socio-economic context

Apart from the impact of policy changes, there are a number of national socio-economic trends which are affecting retailing in general and retail in towns and smaller cities in particular.

Economic change

The impacts of economic globalisation, recent technological advances and changes in work patterns on cities and their economies are well documented and provide the background for much of the Government's urban policies. The demise of manufacturing and related activities and the decline of the seaside tourist industry have altered the character, economic role and catchment areas of many centres, large and small. In particular there has been a negative impact on market towns in rural areas through the decline of traditional farming and agriculture-related upheavals like the decline of local livestock markets, associated with the drastic contraction of small abattoirs following new regulations and the 2001 Foot and Mouth outbreak.

Some towns and cities have succeeded in developing a service-based economy or in capturing new footloose high tech industries. Others have not and the health of their retail sector reflects these trends.

Demographic trends

Predictions suggest that over the next 20 to 30 years spending power will be concentrated in age groups of consumers who value quality and style over cheapness and fashion, who want something unique and who have the leisure time to seek it out. Similarly the projected increase in housing demand, fuelled by smaller households, people living longer, delayed families, divorce and people choosing to remain single is likely to be accommodated primarily in or close to town centres, further strengthening their retail catchments.

All this is potentially good news for those smaller centres that are in a position to offer an alternative to noisy, family-oriented shopping malls: a differentiated retail offer combining multiple and independent shops, leisure, and a place with a sense of identity and character. The predicted increase in town centre populations will make such options more viable.

Leisure patterns and the evening economy

Two key trends are in evidence here: the transformation of retailing into a leisure activity, and the extension in leisure time leading to the '24-hour city'. Both trends offer opportunities for smaller cities and town centres, but they also pose threats. As a response to the confluence of retailing and leisure the trend to provide a combined shopping and leisure offer continues. In addition to 'big box' leisure facilities, shopping centres are investigating adding leisure attractions like ski slopes, climbing walls, skate parks and wave parks, with associated bars and restaurants. The issue here is whether smaller centres can accommodate the size and intensity of development that those formats require, or whether alternatives can be developed that are more amenable to the specific circumstances of those centres.

Regarding the 24-hour city and the evening economy. *The Licensing Act (2003)* moved control of licensing from magistrates to councils, and from summer 2005 will enable 24 hour licensing. Benefits are anticipated by Government in terms of improvements to vitality, jobs, expansion of leisure venues, attracting inward investment and new residents, and a reduction of binge drinking. However the evening economy can also give rise to conflicts with other town centre occupiers and the Civic Trust is conducting a three year programme into how to make evening and night-time economies work effectively. This has identified lack of late night transport, litter, fouling of streets and the need for extra policing as the key problems.

However, whereas larger centres might find ways of reconciling the demands of the evening economy with those of other occupiers through careful zoning, this might not be an option for space-constrained smaller centres. For these centres, the full benefits of the evening economy might not be achievable.

E-commerce

Post the recent dot.com bust, e-commerce has not yet brought about the drastic changes and brave new world of retailing originally forecast. However, it is clear that internet based retailing will increasingly impact upon town centre retailing. The ODPM Property Advisory Group PAG (2001) has looked at the likely impact on retail in different types of urban areas and suggested that:
- Outer London and the South East – attractive and larger towns would do better than more ordinary towns and generally better than northern towns because of their greater affluence.
- Metropolitan areas (excluding the South East) offer better choice so would be less badly affected than small towns.
- Towns outside the South East could lose trade to larger towns, unless they have other attractions, such as a pleasant environment.
- Country towns – could find e-commerce particularly attractive, However, probably have more of a (less affected) convenience role already.

Therefore, although e-commerce might not pose an immediate threat to the economic viability of many small centres, it is very likely to be increasingly relevant over the long term, although in different ways depending on the characteristics of those centres.

Skills

The Local Government Association's survey *Planning reform - a survey of local authorities (2003)* found that "80% of local planning authorities have experienced skills shortages which have affected their ability to deliver an effective planning system in the past 12 months". As already discussed, changes brought about by *The Planning Act 2004* might add to the problem, despite the impact of the Planning Delivery Grant that was established to address these issues, but which is only available to local authorities that are already performing well, and is time limited.

This particular need reflects a broader concern about the skills gap that exists in both the private and public sectors, identified in 1999 by the Urban Task Force, and which more recently has been the subject of the Egan Report, *Skills for Sustainable Communities.* This gap, from planning, to design, to development and management skills, is likely to be particularly acute in smaller authorities where major retail investment is a relatively rare occurrence, and where, as a consequence, the accumulated wisdom found in larger local authorities may not therefore exist.

2.4 The market context

A third set of national contextual issues determine the potential of towns and smaller cities as retail destinations. This refers to trends in the way people shop and in the functioning of the retail industry. Overall, town and smaller city centres are in danger of being both too inconvenient for convenience purchases, and too small to provide a convincing comparison shopping offer. A number of trends have been decisive.

Out-of-town retailing

Out-of-town is undoubtedly a very convenient form of shopping, particularly for bulky goods, for those with access to a car. Out-of-town shopping centres compete directly with town centres offering a complete range of shopping, usually anchored by at least one department store. This became such a threat throughout the 1980s and into the 1990s that since the mid 1990s, the formerly permissive national policy context on retail location had been replaced with one that emphasises the viability of existing centres first.

For their part, out-of-town supermarkets with abundant car parking facilities now compete with most, if not all, town centres, and have already taken their toll on traditional butchers, grocers and bakers. Today, as they transform themselves into hypermarkets they are

Evening economy

Growing elderly population

Town and smaller city centres are in danger of being both too inconvenient for convenience purchases, and too small to provide a convincing comparison shopping offer.

increasingly threatening comparison markets like clothing, electrical goods and toiletries, further increasing the pressure on smaller centres and particularly their independent retailers which cannot compete on the same terms.

Evidence is mixed, concerning the impact of retail parks on town centres. Recent research (by Experian and MORI www.spin-f.co.uk) has suggested that where out-of-town retailing is restricted to bulky goods "high streets have benefited from the release of space formerly occupied by bulky goods retailers moving to retail parks, as the low densities of bulky goods traders have been replaced by complementary high density retailers and other occupiers selling more suitable goods". However, there are a large number of open A1 or partially open A1 out-of-town centres, which pose a particular threat to town centres now Next have discovered they can trade better out of 10,000 sq. ft. in a retail park than they can out of the equivalent space in a town centre, and Marks and Spencer have announced they will concentrate their expansion into retail parks where possible. It is highly likely that other retailers will follow their example.

Polarisation of retail development

In recent years multiple retailers have concentrated investment in the top 100 retail centres to maximise their catchment areas and achieve critical mass. As a result the big retail centres are getting bigger and the rest are being left behind. The result has been an increasing leakage of trade from the smaller centres to the larger ones, with suburban and smaller metropolitan centres being particularly badly hit.

Homogenisation of the high street

Since the 1950s there has been a drastic decline in the number of independent retailers and a corresponding expansion of multiple retailers. Some have argued that increasingly all High Streets are becoming much the same: providing broadly the same mix of multiple retailers, offering the same merchandise, across the country. This, combined with multiple retailers' desire to create brand uniformity regardless of location, has led to High Streets losing their character, uniqueness and identity. This phenomenon is also affecting the leisure offer in town centres with cinemas, pubs, cafés and restaurants also increasingly dominated by chains.

This trend is of particular concern to smaller city and town centres as they do not have the strength of comparison offer of larger centres and cannot successfully compete with them on the basis of the same mix of goods and brands.

Size and number of shops

Multiple retailers generally require larger units than independents so their domination of the high street has made much of the existing retail stock redundant. This is a particular issue in smaller centres where the concentration of independents and older shop units is proportionately greater. As a result many smaller centres now have too many of the wrong type of shops.

This is compounded by the under-supply of larger retail units which restricts the prime retail core and leads to increased rents, effectively forcing out any remaining independent retailers. In some places the spread of the charity sector into vacant units on the edges, and increasingly in the centre, of towns provides a

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Clone Town Britain: the survey

Following on from their *Ghost Town Britain* reports (2002 and 2003) highlighting the loss of neighbourhood shops and services, the New Economics Foundation has launched a national survey to identify which towns have lost their identity and become 'clone towns', and which remain 'home towns' retaining their own character and distinctiveness, based on the proportion of independent retailers and service providers. Initial results from a pilot study of 16 towns, with a population 10,000-100,000 across Scotland, England and Wales, indicate that larger towns are more cloned. They point to the effects of loss of diversity in terms of retailing and leisure and its effects on local economies, culture and health, and are proposing a possible manifesto covering:

- Community veto of chain stores
- A Sustainable Communities Bill
- Rate relief for small retailers
- Local competition policy
- Mandatory code of conduct for supermarkets
- Local money flows analysis
- Local retail plans
- Support for community Development Finance Initiatives
- Community banking
- Community pharmacies
- National inventory of community buildings
- Greater support to Local Authorities to maintain public open spaces

valuable social function in re-cycling goods, raising funds for good causes and catering for the less well-off in society. Unfortunately, concentrations of such uses can perpetuate an image of decline, and further undermine investment confidence.

Restricted shopping hours

Increasingly, retail has become a seven day a week, morning until night, activity with legislation reflecting consumer demand for greater flexibility. Unfortunately, many smaller centres have had difficulties in adopting extended shopping hours, instead maintaining half-day closing and resisting evening and Sunday opening. Behind this behaviour are smaller volumes of trade and greater relative costs of extended hours for smaller retailers. However, as evening and Sunday shopping becomes the norm, these restrictions put smaller centres at a competitive disadvantage, further reducing their share of the market.
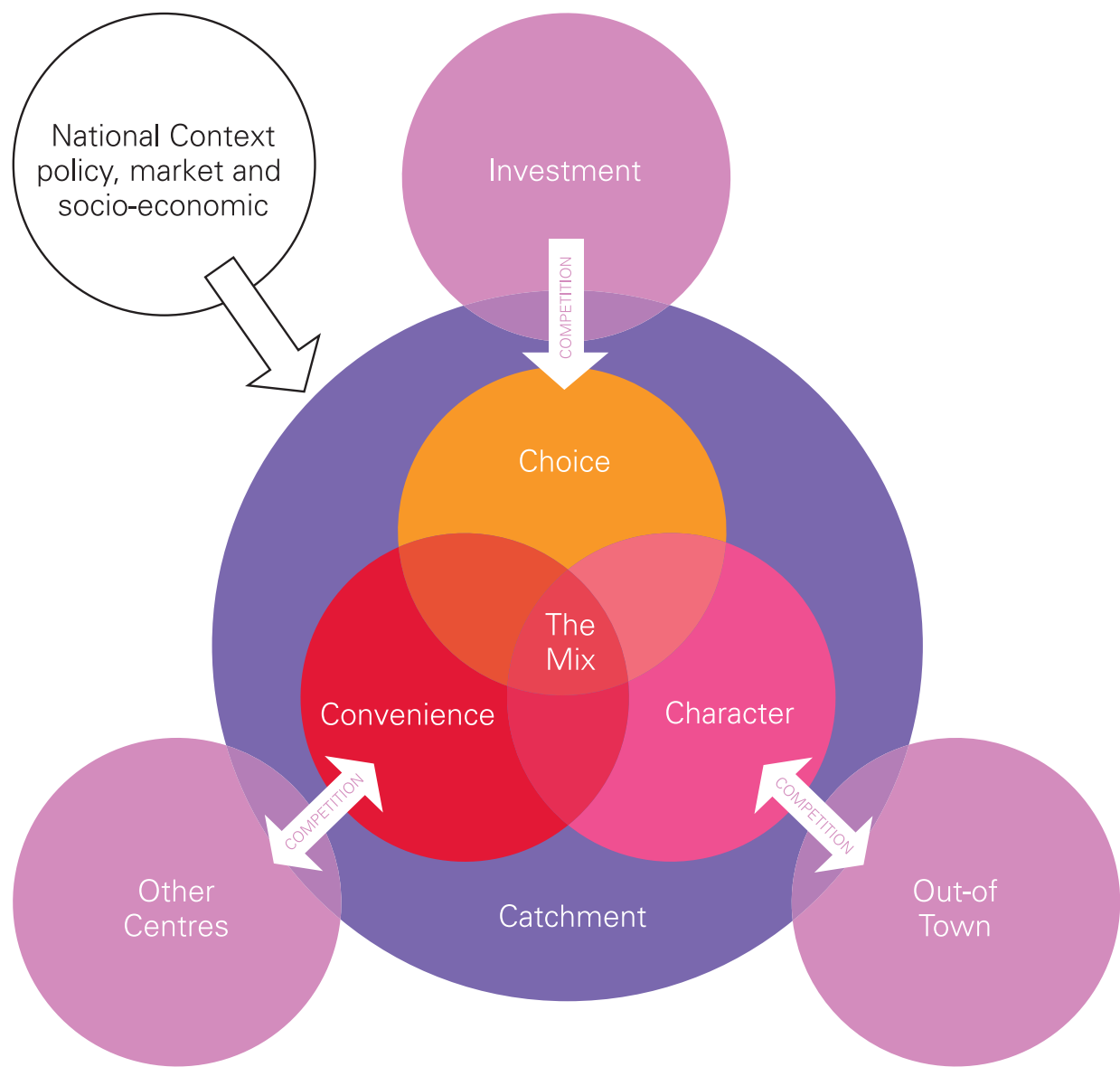
Since the 1950s there has been a drastic decline in the number of independent retailers and a corresponding expansion of multiple retailers.

Homogenised High Street

The 5 'C's of local town centre performance and their inter-relationships

2.5 The local context

Whilst town centre performance in general is affected by the overarching national policy, socio-economic and market context summarised above, there are specific local issues which define their impact locally. The survey suggested that the key issues affecting the individual vitality and viability of town centres and smaller city centres fall into five categories – the five 'C's of local town centre performance:

• **Competition** – The survey suggested that this is the most significant issue affecting the performance of towns and smaller cities. Smaller centres have to compete externally for trade against the attractions of other town and city centres and out-of-town retailing and they also have to compete to attract investment.

• **Catchment** – This refers to the economic position and social condition of the immediate surrounding area that a centre serves and provides the context within which centres compete for custom and investment.

• **Character** – This relates to the physical environment of the town centre and its image or perception by users and investors.

• **Choice** – This consists of the range and quality of the retail offer and the mix of uses available within the centre, particularly in terms of leisure facilities.

• **Convenience** – This covers issues of parking, transport, access and traffic, i.e. the convenience and accessibility of a centre as a shopping destination.

The 'mix'

Character, choice and convenience are the internal 'product mix' factors of town centre performance, with catchment providing the context for the mix. It is the combination or 'mix' of these factors which defines the form and function of a centre and the actions which are appropriate to enable it to compete more effectively. The town centre 'mix' varies from place to place and nowhere is it the same. Therefore, no single solution or set of solutions are likely to be found. What is important is to find the right solution for each place, bearing in mind the particular role each centre has within the overall retail hierarchy.

These 'mix' factors are interrelated: the choice available affects the character of a place, as it does its convenience for shoppers, i.e. whether they can do all their shopping in one place. Convenience affects choice, because poorly accessible centres will not be attractive to retailers, and it affects character because of the physical impact of roads and transport infrastructure. Character affects both convenience and choice because sensitive environments cannot easily incorporate change.

These five 'C's structure the remedies identified in this report to secure a retail-led renaissance, and are addressed in turn in the following chapters. Each chapter reports the challenges and solutions identified in the national survey, offers a case study which provides an example of a local authority that has successfully addressed the 'C' in question, and concludes with lessons for application elsewhere.

Small shops – the traditional High Street

3.0 Competition Remedies

"Remember that the competition won't go away – doing nothing will always adversely affect retail performance."

3.1 Challenges

Competition with other centres and out-of-town retailing for custom and investment is the overarching issue determining the success of towns and smaller cities.

Competition with other centres

The survey revealed that competition from other neighbouring / regional centres with a higher profile, which are more likely to attract further investment, is the most significant threat to smaller centres. Rivalry between centres has always existed but as national retailers focus on major centres resulting in greater choice being available in larger cities and increasing their catchments, 'leakage' of comparison expenditure from towns and smaller cities to these centres is becoming more significant. In many cases this resurgence of major cities is still in the pipeline, so the full extent of the threat to smaller centres has not yet materialised.

Towns and smaller cities also compete with other medium-sized centres nearby, particularly within conurbations. This can weaken adjacent towns, if competition is for the same limited resources or retail offer, and can be an obstacle to further retail-led regeneration. Effectively medium sized, as is so often the case, can simply mean mediocre; with towns and smaller cities unable to compete with the biggest and best, or with the small niche towns.

Competition with out-of-town retail

Retail expenditure leakage to highly accessible out-of-town shopping destinations and out-of-town development is diluting the demand for, and deterring, in-town development. In particular, increasing competition from superstores and retail parks selling 'high street' goods is adversely affecting towns and smaller cities by providing a daily / weekly one-stop-shop selling practically everything that used to be sold in the individual shops of the high street.

"As a former Tesco employee (who could never ever admit it whilst I worked there!) this trend has drawn trade away from the traditional High Street, unless the superstore is physically linked to (and therefore anchors) the smaller shops."

The free car parking offered by out-of-town development is a major detractor from confidence to return to town centres, as is the preference of most developers for edge of centre / out of centre opportunities which are more straightforward to develop.

Competition for investment

Local authorities noted the unwillingness of the private sector to invest, particularly in mixed-use development, which was holding back efforts to regenerate town centres and bring forward development opportunities. Concerns were expressed about the general investment climate, problems in attracting retailer (particularly retail anchor store) and investment interest and building developer confidence, together with the impact of investment opportunities still to be delivered in the larger cities. They also noted the need to compete for RDA and other sources of funding, when town centres and retail development in general were not considered funding priorities.

BCSC members acknowledged there had been under-investment by developers and retailers in recent years, following the over-investment during the late 1980s / early 1990s development boom. They also highlighted land ownership, physical and historic constraints, resulting in lack of investment, and acknowledged the difficulty in attracting higher order retailers to smaller centres.

3.2 Remedies

The survey found many instances of town and smaller city centres fighting competition, some quite successfully, some with difficulty. The following paragraphs summarise the paths they have adopted to do so and point to potential ways of competing effectively.

Resisting out-of-town development and directing development to town centres

Past planning regimes allowing out-of-town developments have made it more difficult for smaller centres to thrive. Recent planning policy has been relatively effective at reversing the trend, but there is a continuing need for firm policies restricting the growth of out-of-town retail development. Local authorities, in particular, argued that planning policy should provide even greater certainty about the locations where retail development will be supported.

The survey found support for tighter planning constraints on retail warehousing and superstores to restrict further A1 uses in existing parks, especially for the sale of non-food, non-bulky goods. This, it was suggested, should include tightening up of the use classes order to restrict the sale of 'town centre' comparison goods in out-of town locations and control of mezzanine floor development.

"Despite PPG6 we are experiencing real difficulties in controlling out-of-town retailing. Retail warehouses are expanding their floor space by putting in mezzanine floors, which do not currently require planning permission, and it is

difficult to enforce the food/comparison goods ratios stipulated in supermarket planning consents. This is putting further pressure on our already struggling town centre."

Local authorities argued that there was still a need to defend their centres against unjustified developments in surrounding areas. Indeed, there was a view that out-of-town developments should be made to compete on a more level playing field with town centres in relation to business rates and car parking charges, which could even include an environmental tax for pollution caused by customers driving to out-of-centre locations. There is a perception that policies focusing new city centre type retail, leisure, office and residential in the town centre and encouraging food retailers back into smaller centres are still required, as are incentives for town centre development.

Rebalancing the retail hierarchy

The research suggested that there is a need for clearer identification of differences in retail centres of different sizes and types (neighbourhood, district, town-centre, regional, etc.) to limit overspill and over-development of certain town or edge of town sites. As one planning officer noted: "The need for some 'rebalancing' of hierarchies will be important if investment is not to be increasingly concentrated in centres like Birmingham at the expense of places like Walsall – without this, whatever development is secured for Walsall, we will always find the competition is getting increasingly strong."

However, the establishment of a logical retail hierarchy is politically problematic, and was seen to be primarily a regional issue. It was suggested that a co-ordinated country-wide retail impact assessment and planning framework might be needed. More realistically, the Regional Spatial Strategies (RSS) envisaged in the new planning act, and in *PPS11*, should take a more creative approach to providing a 15 to 20 year vision for retail growth and development across each region, recognising the roles and inter-relationships between centres, their differentiation strategies and attempting to balance these to provide greater certainty.

"Remember that the competition won't go away – doing nothing will always adversely affect retail performance."
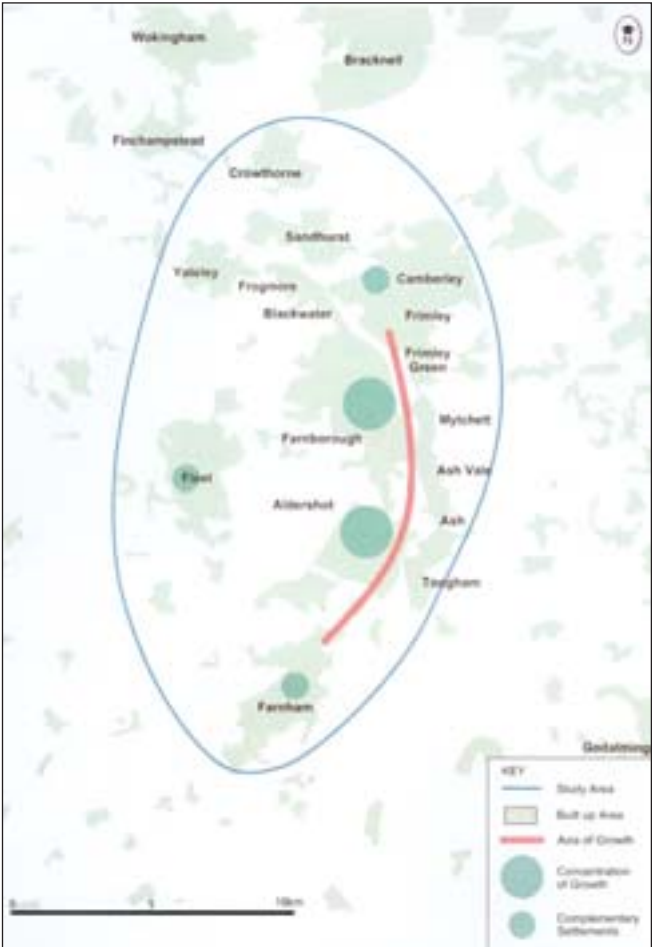
Blackwater valley

Working together

To meet a requirement set out in *RPG9*, the Blackwater Valley Network of local authorities commissioned a study from WS Atkins and Ancer Spa to look at ways of optimising economic growth. This study included taking a view about the longer-term roles of the five main towns in the Blackwater Valley, which form a polycentric land use pattern. The five towns are Aldershot, Camberley, Farnham, Farnborough and Fleet and are roughly of the same size and to some extent compete with each other, so no one town can aspire to a higher order function. As a result, a high proportion of the population go outside the area for their higher order shopping requirements. The study looked at whether altering this spatial pattern of development would enhance the long-term sustainable development of the area.

Differentiation

Findings suggest that the most effective solution to competition with other centres is through differentiation: the development of retail opportunities in keeping with the character and actual catchment of an individual town. Town centres must offer unique experiences not available in large out-of-town retail outlets or indeed in the next town or city. This can only be achieved by building on their unique qualities, including the character of the location, but also by recognising what role they can usefully play within the retail hierarchy.

Opportunities for differentiation can be identified through research, which should look regionally, as well as at the town or local area, to establish points of differentiation. Having established what is unique, adopting a town centre management approach and committing to a long-term marketing and tourism strategy to communicate 'Why shop here?' can help to enhance the centre's image, increase footfall and boost local confidence, particularly amongst retailers. Future investment can then be directed to further differentiate the centre.

Attracting investment

Retail-led development is seen as a method of strengthening and securing a centre's competitive position by providing a boost in confidence, making the centre more attractive to shoppers, increasing footfall, establishing critical mass and the opportunity to regain lost trade. It was also seen as a focus for new activity and a catalyst for further development.

However, attracting investment for development requires a long-term perspective, and can be a frustrating process. Project development lead times and planning requirements are time consuming and projects are subject to the vagaries of the development cycle. Nevertheless, some smaller centres have succeeded in making their location attractive to investment through marketing, appropriate selection and assembly of sites and speedy handling of planning applications.

"Developers are looking for certainty in relation to the planning framework and policies that impact on any retail-led regeneration proposals. They would need to have the confidence that both Members and Officers have the commitment to support the delivery of any proposals. It is equally important that there is a clear and deliverable strategy for site assembly within a reasonably short period of time. Developers need to know the local authority has the resource and capability both in terms of personnel and, where necessary, financial resources to bring forward and deliver regeneration proposals."
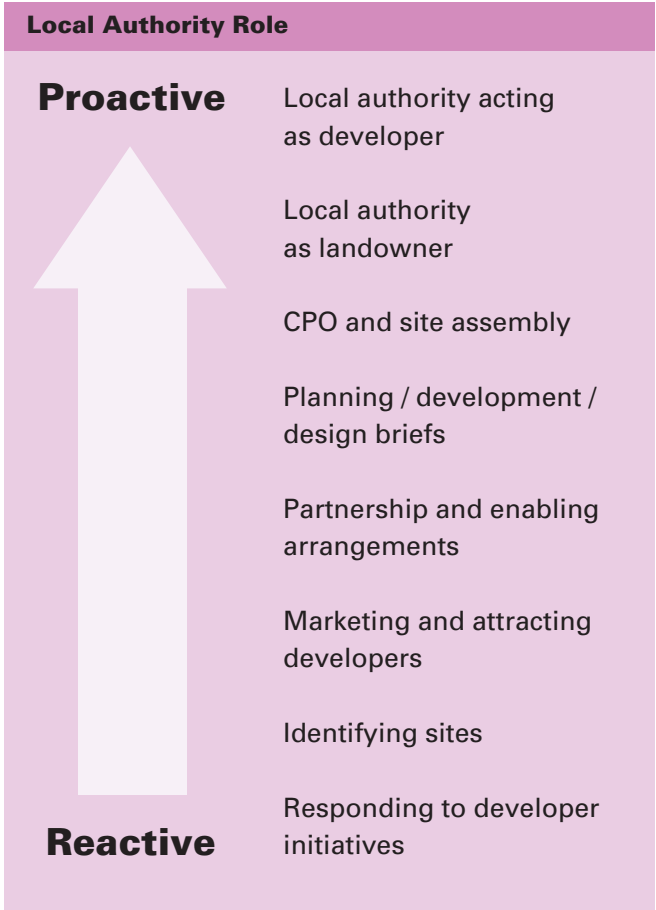
Raising awareness (and confidence)

St Helens had been bad at marketing itself in the past and it was difficult to get developers interested in the town. A series of 'heli-days', based a Haydock Racecourse, were organised with other councils in the area, where developers, property agents and other movers and shakers including the North West Development Agency and English Partnerships were invited for helicopter tours to see the advantages the area offered. These marketing efforts are now paying off and there is specific developer interest in St Helens, which is likely to increase further with development of the Omega site.

Identifying opportunities

Debenhams is expanding rapidly. The chain currently has 104 stores, with a further 20 due to be open by 2008 and additional requirements beyond this. They estimate that department stores could potentially go into 160 markets in the UK.

Since the late 1990s, when the pipeline dried up, Debenhams have been actively looking for sites, and have found talking to local authority Chief Executives particularly useful. They do not develop themselves, but use three to four medium-sized developers (because they have a more entrepreneurial approach) to identify sites in target towns. However there have been problems and setbacks along the way with protracted Section 106 negotiations, EEC competition rules, administrative problems and a lack of accountability amongst local authorities for planning applications running late and leaving developers financially exposed.

They find development is more difficult in smaller centres than larger ones because of problems with land assembly, family businesses that do not want to move, and the political process. By contrast, large cities have Chief Executives who are professional 'go-getters' and, they suggest, "You don't always get the same level of 'go-getting' in smaller centres".

To specifically address the challenge of smaller cities and towns, Debenhams are now looking to open a number of smaller format stores in town centres that cannot support a full-sized store. These will generally be places where physical development constraints exist, but where there is a sizeable catchment and demand for a department store.

A wide range of means are being used by the most active local authorities, and one local authority expressed concern about having to resort to varying marketing ploys to increase market confidence, e.g. significantly reducing rents to successfully market a completed scheme. On a positive note, it was pointed out that "Many retailers have active requirements for smaller centres and, currently, demand is not necessarily an issue – the issue is understanding what the retail experience will be in the future".

The role of local authorities in attracting retail-led investment

In attracting retail-led development, local authorities have adopted two basic approaches, either proactive or reactive. Local authorities can take a reactive role awaiting and responding to developers' initiatives, or can move along an ascending scale of proactive approaches from identifying sites to attracting developers, establishing partnership and enabling arrangements, producing planning / development / design briefs, CPO and site assembly, involvement as a landowner and even acting as the developer. The majority of local authorities had taken a combination of approaches on different schemes.

Busy high street, Bexleyheath

Photo – Bexley Council

Local Authority Role

Proactive

Local authority acting as developer

Local authority as landowner

CPO and site assembly

Planning / development / design briefs

Partnership and enabling arrangements

Marketing and attracting developers

Identifying sites

Responding to developer initiatives

Reactive

Out of town shopping

Reactive approaches

Where local authorities had responded to developers' proposals, they described their role as encouraging and supporting schemes through pre-application discussions with the developer, public consultation on masterplan proposals, and planning negotiations (provided they corresponded in principle with the council's own strategy and planning policies). In such cases, the developer had already secured the development site or was working on their proposals with the landowner. In one case, the council had taken a leading role in defending a particular scheme against competing proposals in inappropriate locations.

Identifying sites

Most local authorities in the survey had been active in securing retail-led development. Almost half of those surveyed said they had been responsible for identifying the site, typically using the development plan process to identify retail need, and evaluate and allocate sites for retail-led development. Other mechanisms for identifying sites were given as: masterplanning, vision documents, town centre strategy/action plan and the work of a town centre partnership.

Marketing and attracting developers

Almost a third of local authorities in the survey had been responsible for attracting developers, and in some cases retailers, to the project through: commissioning feasibility studies; discussions with potential developers; advertising for expressions of interest, managing the selection process and procedure and appointing the preferred developer or organising a competition to appoint a preferred development partner.

Partnership and enabling arrangements

A quarter of local authorities said they had been involved in some form of partnership arrangement or enabling role to facilitate the development. This may have been a formal or informal partnership with a key landowner, actively co-ordinating the development process, pulling together a range of partners to make the project work, leading the masterplanning or regeneration process or enabling all stages of the project through a Development Team approach.

A development team approach

Scunthorpe took an active role in enabling all stages of the retail-led development through a Development Team approach. The Head of Planning and Regeneration chaired regular meetings of council officers - lawyers, valuers, surveyors, highways, planning etc - to progress the development. This group met regularly with the developers over four years before building commenced to resolve issues like land negotiations and sales, highway closures, traffic regulations, design and issues surrounding the processes of the planning application. Members were involved in some of these meetings and regular updates were given to outside groups like the Chamber of Trade.

More proactive approaches

A fifth of local authorities had gone further up the 'proactive scale' and produced a planning, development or design brief for the site, sometimes as Supplementary Planning Guidance. Similar numbers had also been involved in site assembly, most involving the use of CPO powers. A much smaller proportion were involved in developments as landowner, some as the major land holder, whereas a few had gone as far as providing direct investment for a site: as capital investment in public realm, a contribution towards a public venue building or as joint venture partner. 'Well being' powers contained in *The Local Government Act 2000* make such approaches increasingly viable, and may offer a way forward for local authorities that are finding it difficult to secure retail investment.

Busy High Street

3.3 Walsall – Fighting competition

Historically a wealthy town, now suffering from industrial decline, Walsall retains a heritage of many attractive old buildings but the area is fragmented both socially and physically. Walsall town centre suffers from competition from the city centre retail offer in Birmingham, eight miles away; The Merry Hill Shopping Centre, also 8 miles away; other town centres in the West Midlands/Black Country conurbation, particularly Wolverhampton; and from nearby 'up-market' towns like Lichfield. Whilst not new, this competition was less of an issue – more like friendly rivalry – when people were less mobile and manufacturing was the mainstay of the town's economy.

Since the 1980s, however, the town has been affected by an explosion of out-of-town retailing in the area and by the re-emergence of Birmingham. As a result of this competition, research by Roger Tym and Partners in 2001 indicated that retail leakage of comparison expenditure from the town's central catchment area was 60%. The result has been that, despite a population of over 250,000, consumer demand has been limited and it is difficult to attract interest from investors.

Shaping the retail offer

Despite this, the council has been responsible for bringing forward several retail schemes, most recently Town Wharf

Town Wharf

and Crown Wharf, by identifying the sites attracting developer interest and selecting the preferred developer. Recently the council has also been actively resisting pressures for further out-of-town retail development, including fighting three major Public Inquiries between 2001 and 2002.

By way of example, in 2000 three proposals emerged for factory outlets: the Shannons Mill redevelopment of a former saddlery in Walsall town centre; a proposal for Brownhills District Centre; and the Burntwood edge-of-centre site in Lichfield. The council supported the Shannons Mill application and objected to the other proposals leading to a Public Inquiry into the Burntwood scheme, which was subsequently refused by the Secretary of State.

Walsall's approach has been based on proactive efforts to identify and bring forward development opportunities within and on the edge of the town centre. Indeed, in another case the inspector commented "There could hardly be a better example of a council attempting precisely what *PPG6* advocates".

Investing in quality and lifestyle

These efforts go hand in hand with concerted efforts to regenerate the town centre in Walsall into a 'lifestyle' place that offers the best of both worlds: the infrastructure of a major city with easy access to the countryside. The council has designated significant areas for development and has invested directly in the quality of the town centre by funding pedestrianisation, public realm improvements and public art and bringing

Public realm

forward projects like The Crossing at St Paul's (conversion of a church into retail and conference space) and the award-winning new bus station and art gallery. They argue that "Design will be one of the ways this town differentiates itself: it is a key theme for the regeneration company. Developers have become more comfortable with the idea of design competitions; they appreciate that the stakes have been raised in Walsall and this stimulates a different kind of developer interest. We have made a conscious choice to set the bar high because the shopping environment will make people want to come". These efforts have clearly affected perceptions of Walsall as demonstrated by Urban Splash's decision to develop the Walsall Waterfront

canalside site, adjacent to the New Art Gallery – one of their first developments outside of a major city.

Differentiation

The Shannons Mill scheme provided a further opportunity to differentiate the town. The site came forward as the result of the site owners' desire to relocate their leather working operation from the mill building and to find a replacement use that would support the relocation. It has been actively supported by the council because it represents the opportunity to differentiate Walsall by providing a factory outlet complex within the town centre, although there is a risk it will put off higher order fashion retailers from locating in the town. It also provided the opportunity to redevelop an existing Sainsburys food store. For their part, *PPG6* gave St Modwen the confidence to acquire a major interest in the site and the scheme is being developed as a joint venture between St Modwen and Norton Proffitt, a local developer.

Leadership and vision

Following dark days for Walsall when the council came perilously close to being taken over under special measures, transformational changes have taken place, with new like-minded people taking a shared view of what is needed, and providing much needed officer and political leadership.

This has culminated in the creation of a URC – Walsall Regeneration Company –

Shannons Mill

in the town, which was incorporated in March 2004. The URC has taken over responsibility for physical development in the town and a Regeneration Framework Plan is currently being prepared by Roger Tym & Partners for the Walsall URC area, with a particular focus on the town centre. This will be an economically-driven document based on the URC's objectives: to complete regeneration projects worth £750m; create or safeguard 15,000 jobs; remediate 120 hectares of land and create 200 new businesses. The plan will be finalised in January 2005 and followed by an investment plan backed by English Partnerships and Advantage West Midlands. Funding has also been secured through the West Midlands Local Transport Plan to ensure the town has the infrastructure it needs for the 21st Century. These two documents will provide the basis for future discussions with investors.

Heritage buildings

Summary –
What can be done to attract retail-led development when demand is low and competition both from other centres and out-of-town retail is high?

- Identify opportunities for town centre retail development.
- Actively resist out-of-town development.
- Invest in town centre quality and life-style.
- Differentiate through retail-led development.

Crown Wharf

3.4 Lessons

Competition from other neighbouring / regional centres with a higher profile, which are more likely to attract further investment, is the most significant threat to smaller centres. Retail expenditure leakage to out-of-town shopping destinations, in particular superstores and retail parks selling 'high street' goods, is also adversely affecting towns and smaller cities. The free parking offered by these outlets undermines confidence to develop in town centres. Smaller towns and cities can therefore find it difficult to attract retail-led investment.

Resisting out-of-town development

• Policy has for some time provided a certain and consistent framework for retail investment in town and city centres, and in recent years has paid dividends in the range of major investments it has spawned in larger retail centres. This framework should not be loosened until towns and smaller city centres have also reaped the benefits. However, there are significant concerns that the emerging *PPS6* will lead to a freeing up of policy, and to many more applications and inquiries for out-of-town retailing.

• There is a need to restrict the sale of 'town centre' comparison goods out-of-town. This could possibly include further changes to the Use Classes Order and for planning authorities to be better able to enforce planning restrictions on food / non-food proportions as supermarkets move increasingly into comparison retailing.
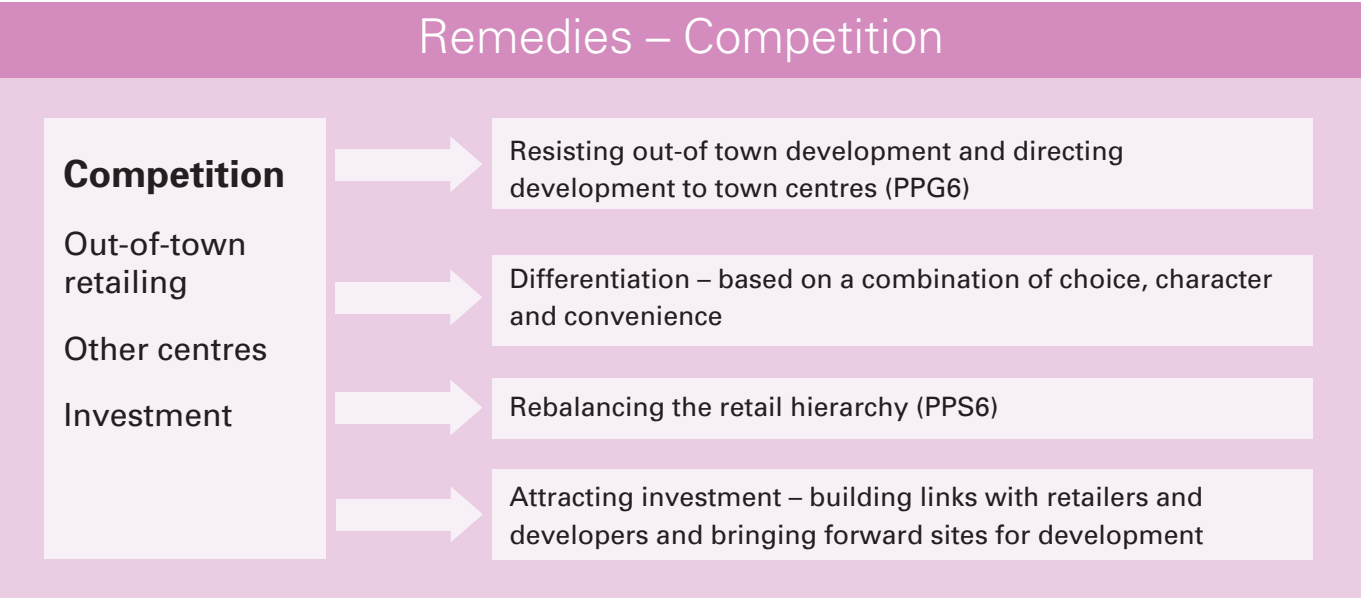
• A further issue of concern was the expansion of existing out-of-town retail units increasing out-of-town retail space, particularly through the creation of mezzanine floors, which planning authorities are currently powerless to control.

• Out-of-town developments should also compete on a more level playing field in relation to business rates and car parking.

Rebalancing the retail hierarchy

• The increasing importance of competition between town centres indicates that a hierarchy based on broad comparison, convenience and neighbourhood functions is no longer sufficient. This report identifies a framework for towns and smaller cities to establish how they can differentiate themselves based on the five 'C's of competition, catchment, character, choice and convenience. However, it is for regional strategy to bring together the individual differentiation strategies of each centre into a compatible network.

Differentiation

• In order to compete with larger centres, towns and smaller cities need to ensure they have a sufficient critical mass of retailing to meet the needs of their immediate catchment area, to prevent excessive retail leakage and, beyond this, they should aim to develop specialisation or a particular reason for users to be attracted to the town centre. Differentiation can be achieved by developing retail opportunities in keeping with the character and actual catchment of an individual town whilst promoting the centre's unique attractions. This requires vision and leadership at the local scale.

Remedies – Competition

Competition

Out-of-town retailing

Other centres

Investment

→ Resisting out-of town development and directing development to town centres (PPG6)

→ Differentiation – based on a combination of choice, character and convenience

→ Rebalancing the retail hierarchy (PPS6)

→ Attracting investment – building links with retailers and developers and bringing forward sites for development

Attracting investment

- Under-investment and difficulties in attracting the right developer interest is holding back efforts to regenerate town centres. Attracting investment requires a long-term perspective, an understanding of developers' requirements, commitment and resources from local authorities.

- Most local authorities adopt a variety of different approaches to attracting investment on different schemes. They can take a reactive role responding to developers' proposals or an ascending scale of proactive roles from site identification, attracting developers, development briefs, CPO and site assembly, to acting as the landowner or even the developer. Local authorities may need to be more ambitious in the future, perhaps utilising their new 'well-being' powers to lever in private sector investment.

Retail warehouses

4.0 Catchment Remedies

"A quality environment, jobs, schools and housing are basic ingredients in building both confidence and the sustainability of the retail performance for a given area. The challenge will be the towns served by relatively less well-off catchments. The strategies will need to link into factors such as improvements in infrastructure."

4.1 Challenges

The economic position and social condition of the area immediately surrounding a centre serves to provide the context in which centres compete for custom and investment. In general, concerns with catchment are related to the profile and size of the town, residential values in and around it, and with the nature of the retail mix and whether or not it matches the requirements of the population in the catchment area. The local demographic dynamics – whether a population is growing or declining – also seem to be significant.

The socio-economic profile

Concerns about the limitations of the catchment area were often expressed in terms of the local economic climate and the level of disposable income.

"The current socio-economic profile of the area is not attractive to many retailers, therefore it may be difficult to attract these retailers to Clydebank. The current variety of retailers in Clydebank are mainly from the value end of the market and do not have as wide an appeal as mid-market retailers. Therefore a retail-led development project without mid-market retailers may be difficult to achieve."

This was linked in some places to low levels of education and aspiration amongst the community in some catchment areas. Beyond the obvious problems of expanding the limited available expenditure, this raises the need to reinvent not just the town centre but the rest of the town or city as well in order to produce a profile and image that attracts investment and creates demand and opportunities. A reason for greater concern for smaller

centres in more deprived regions is the finding that retail 'leakage' can be greatest in centres with relatively poor catchment areas.

Assessing the potential

Some local authorities raised the concern that their centres do not serve their immediate catchment areas well because of a mismatch between their retail mix and the socio-economic profile of the population they serve. As one local authority put it, "our catchment is 60% A,B,C1 but only 30% of the shops here cater for them". Of course, this can also happen the other way around. However, as one retail advisor explained:

"Retailers will use generic catchment data to give them an initial idea of the trading potential for a town and whether it is worth their while considering taking space. They will, however, either undertake their own catchment research or other investigations into trading potential to decide whether to pursue a store acquisition. They will be confident to invest if there are complementary traders either in a location already or who will commit with them, and conversely will steer clear of saturated markets or where the competition will get stronger. In sub–£100A towns many traditional town centre traders will be particularly concerned about the competitive threat of existing and proposed superstores and edge of town retail parks"

4.2 Remedies

A centre's catchment defines the level of retail development which is economically feasible in a centre and can only be influenced in a limited way through long-term economic development and social inclusion programmes. Respondents noted that the links between retail-led regeneration and the wider regeneration agenda need to be made, and it is important to understand the demographics and market dynamics which drive consumer behaviour in a given area. This realisation underpins the solutions some smaller centres have adopted to deal with catchment area problems.

The impact of regional guidance

House prices in Carlisle have doubled in the last two years but regional guidance has reduced housing figures by 15% to help the regeneration pathfinders in Liverpool and Manchester. Although the city has not historically had an affordable housing problem, it has now. The current housing density requirements are also causing problems because the city believes that to strengthen its catchment, it needs to develop more executive housing to balance Carlisle's traditional housing stock of small terraced houses. At the moment, high earners tend to live in the surrounding villages and commute into Carlisle. As well as encouraging unsustainable travel patterns and affordable housing problems in the villages, the limit on growth will effectively undermine the long-term development potential of the city centre.

A role for strategic planning

The evidence from the research confirmed that there is a need for strengthened strategic / regional planning to develop long-term coordinated regeneration strategies for the entire local economy to: attract inward investment; create employment; increase income levels; raise expectation levels and promote population growth. Associated with this is the need to release land for housing and commercial development. In particular, increasing levels of house building is an important tool in rebalancing catchments, perhaps including relaxation of density policies in some areas to attract higher income households.

Developing the catchment

Retail is a major employer, and although the net employment benefits of multiple retail development are unproven, local authorities have worked with retailers and developers to deliver employment opportunities and contribute to economic development objectives. Cumulatively, these are likely to alter the profile of the catchment areas of their town centres.

Retail – stimulating employment

Employment opportunities were created in Bishop Auckland following recent development of a new Asda store on a reclaimed edge-of-centre site (a former foundry). Working with Asda, the Wear Valley local development agency and the Job Centre targeted and trained unemployed people in the local community (the five closest wards are all in the IMD10% most deprived category) to gain employment in the store. 150 jobs were created. As well as direct employment opportunities created by retail development, retail can also be a spur for other investment opportunities, further influencing the nature of catchments. In Doncaster, the regeneration of the Markets area (two outdoor markets, the Corn Exchange and Woolmarket) will provide a wide range of goods and a major new opportunity for business start-ups and will link the new university to the existing town centre.

A variety of different approaches to promoting change in a town centre's catchment area were identified. In Irvine the need to increase disposable income in the town, by developing new employment opportunities and encouraging population growth, has been identified and is being addressed in the new development plan by the release of land for housing and commercial development. In Hastings the major development proposals currently being taken forward by the town's Task Force, such as the University Centre and new office and leisure development, will help to increase the number and diversity of

Housing

"Retailers will use generic catchment data to give them an initial idea of the trading potential for a town and whether it is worth their while considering taking space."

people using the town centre and thereby help to increase its overall vitality and viability. This may provide greater scope to attract a wider range of retail uses in the longer term. In each case, plans and aspirations are inevitably long-term and based on a strong shared vision.

The vision thing

Durham City Steering Group (an informal group comprising representatives from Durham City Council, Durham County Council, One NorthEast, Durham University and Durham Cathedral) commissioned the first phase of Durham City Visioning work in 2003. The first phase of the work entailed three studies that have run in parallel yet are linked: a retail and leisure study, an accessibility study, and a development audit.

The accessibility study considered the accessibility and transport options available to Durham which will strengthen the city as a place to visit, live and work while overcoming existing transport issues. The development audit considered the land use potential offered in the Durham City area with a view to improving the retail and leisure offer. This work has been partially funded by the County Durham Economic Partnership, utilising delegated Single Programme funds from One NorthEast (Regional Development Agency).

Public consultation events, including Durham City Local Strategic Partnership and the County Durham Strategic Partnership, took place in June 2004. A second phase of masterplanning will then follow, knitting together the three studies into an implementation action plan over the next 20 years to provide an integrated approach to regeneration and development within Durham City. The aim is to create a vision to build on the many existing cultural and historic assets the city possesses to create a unique visitor destination that offers a quality shopping and leisure experience.

"A quality environment, jobs, schools and housing are basic ingredients in building both confidence and the sustainability of the retail performance for a given area. The challenge will be the towns served by relatively less well-off catchments. The strategies will need to link into factors such as improvements in infrastructure."

Case Study **Scunthorpe**

4.3 Scunthorpe – Developing the catchment

Scunthorpe is a town which developed relatively recently based on steelworking. In 1851 the area consisted of five villages with a total population of 1,245. The five villages retained their separate identities until the 1920s when Scunthorpe emerged as the commercial centre, resulting in a town centre located to the north east of the town close to the steelworks. The town was subsequently masterplanned as an 'industrial garden town' by Patrick Abercrombie in the 1930s, applying the principles of the Garden City Movement. Although this plan was not fully implemented, the town was provided with substantial areas of parks and gardens, which counteract its sometimes rather unattractive built environment.

Catchment area problems

Rationalisation of the steel industry in the 1980s led to closure of one of the town's two steelworks, resulting in mass unemployment (19.2%), significantly reducing disposable income, and leading to a corresponding reduction in retail investment.

By the late 1990s, Scunthorpe town centre had dropped rapidly down the retail rankings, it had lost most of its multiples and the High Street was dominated by discount retailers. This decline was compounded by the development of 473,000 sq. ft. of out-of-town retail in three centres around the town, anchored by supermarkets.

Following significant investment in skills and training, by the mid 1990s the town's economy had successfully diversified and unemployment was close to the national average, but the retail and leisure offer lagged behind. This may have been because the catchment is primarily C2DE, in contrast to most retailers' ABC1 target market, although disposable income in

the town is quite high because the cost of living is relatively low.

Next, for example, chose to locate out-of-town because Scunthorpe was 'not their kind of town' and by locating out-of-town they felt they could attract business from the surrounding rural area. Research by Donaldsons in 2001 showed that the

High street

town was experiencing just over 50% leakage of retail spend, with respondents preferring to shop at competing shopping centres (37%) and out-of-town locations (14.6%), aided by the town's excellent road and rail links. There was also evidence of leisure spend leakage: there was only one rather poor cinema in the town and bus trips were organised to night clubs elsewhere.

The local authority response

The local authority recognised that to further their economic development objectives and attract new industries to the town, a modern attractive town centre was required as part of the Scunthorpe/North Lincolnshire package on offer to investors. They decided the town centre's transport links needed a major overhaul and its leisure and retail offer needed a step change to safeguard existing town centre users and operators and to reduce leakage.

The resulting development is mixed-use consisting of 250,000 sq. ft. of new retail space; a new bus station; a multi-screen cinema (successfully directed to the town centre despite developer interest in two out-of-town locations); a multi-storey car

Town centre location

park (now run and managed by the local authority); and a shopmobility centre (secured through Section 106 contribution). The shopping centre – The Parishes – links with the existing, now re-branded, 1960s Foundry Shopping Centre and Southgate Mall to create a square of retail frontage with an anchor store at each corner.

The scheme opened in 2002 and had to overcome some negative local opinion that it was not a 'proper' shopping centre because it was not enclosed. However, it has been successful in rebuilding retail confidence in the town. New multiple retailers like HMV and H&M have been introduced, 95% of the floorspace in the Parishes is now let, the Foundry Shopping Centre is 96% let, and the Southgate Mall is fully let for the first time in 10 years.

Indeed, pedestrian counters in the Parishes indicate 50,000 additional shoppers per week compared to manual counts before the centre opened, and by spring 2003 10 major retailers including the Westgate department store had invested in store refits. On the downside there has been some migration of the town centre eastwards and there are still some vacant units on the High Street as a result of units relocating into the Parishes.

Managing the town centre environment

A further area of emphasis has been enhanced town centre management. In Scunthorpe the Town Centre/Tourism Management role sits within the Planning and Regeneration Service. In this position, it leads the Scunthorpe Town Action Group (STAG) which brings together council officers, multiple and independent retailers and the two shopping centre managers to understand their issues and requirements and provide support in the form of training, marketing and promotions. The STAG has

actively supported speciality retailing in the area known as The Streets adjacent to the main shopping area.

Further repositioning

Although the Parishes has gone some way to addressing retail leakage, concerns remain that the town centre does not, as yet, have a balanced retail offer, with many key multiples under-represented if present at all. It is believed that the town does not have the necessary critical mass to serve the needs of its catchment area and hold its own against the competing centres of Grimsby, Hull, Doncaster, Lincoln and Meadowhall; nor does it have 'pull' factors to attract people from these centres to Scunthorpe.

In order to further transform the profile of the town, Scunthorpe successfully applied for the second phase (2002) of Yorkshire Forward's Renaissance Towns programme. Under this programme, the Scunthorpe Declaration has been developed, using the Town Team approach, which aims to "reposition Scunthorpe over the next 25 years as a successful and sustainable advanced manufacturing town which is an effective economic driver for North Lincolnshire". This document sees the future of the town deriving from its competitive advantage through manufacturing excellence, but this will not be the major source of employment because of operational efficiencies. Therefore Scunthorpe needs to diversify its economy by maximising its strategic position and becoming a sub-regional hub. Creating a strong, attractive, vibrant town centre through promoting mixed-use development and enhancement of the public realm is seen as a major element of this strategy which will consolidate a more favourable economic profile for the town and, it is hoped, strengthen its catchment.

The Streets – Ravensdale Street
Photo – Lee Beel

New bus station, car park, cinema and shopping

Summary –
How does retail-led regeneration fit with the aims of wider economic development to change the profile of a town's catchment area?

- Retail investment is directly related to the economic condition of a town's catchment, although there can be a lag effect.
- Achieving a critical mass of retailing is necessary to address retail spend leakage.
- Creating a strong, attractive, vibrant town centre is a significant element of measures to attract new industries to a town and change the profile of its catchment area.

4.4 Lessons

The research emphasised that a town's immediate catchment defines the level of retail development which is economically feasible in a town centre. High levels of unemployment and corresponding low levels of disposable income seriously constrain the level of retail investment which is viable in a centre, as does the socio-economic profile of the catchment, because retailers use this to identify the towns they wish to trade in. A town's catchment can only be influenced to a limited extent through long-term efforts to reinvigorate the economic basis of urban areas and transform the socio-economic profile of the population.

Regeneration

- The prospects for retail development cannot be separated from the general health of the local economy. Retail-led regeneration and wider regeneration have to evolve hand-in-hand.
- There can be a mismatch between a town's retail mix and the socio-economic profile of its catchment, so understanding the demographics and market dynamics which drive consumer behaviour in a given area is essential if retail-led developments are to match the evolving profile of the catchment area.
- Having an attractive, vibrant town centre is an important element of the package needed to reposition and attract new industries to a town.

Employment

- Increased employment opportunities bring more money into the local economy and support greater retail provision. Retail development creates employment opportunities (although the net employment benefits of multiple retail development are unproven) and some local authorities have worked with retailers and developers to target these jobs at the unemployed and disadvantaged groups.

Strategic Planning

- Releasing land and increasing levels of house building, particularly for housing designed to attract higher income households, is an important tool in strengthening catchment areas. Regional Guidance can obstruct this process.

Remedies – Catchment

Catchment

Economic position

Social condition

→ Regeneration, economic development and social inclusion programmes

→ Retail job creation

→ Strategic planning – releasing land for commercial and housing development
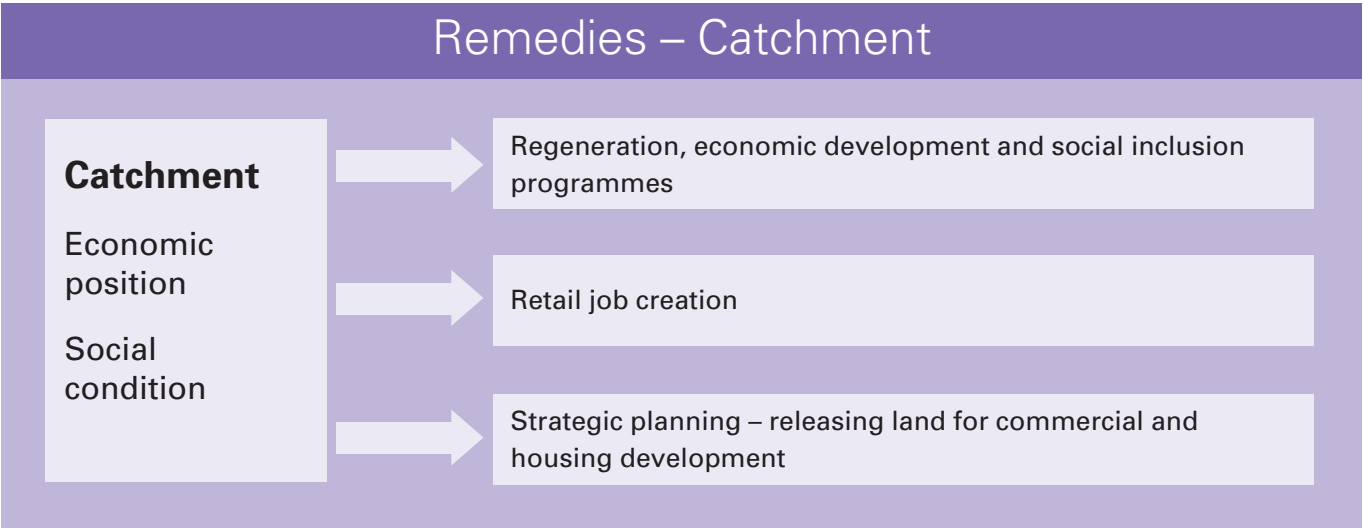
Critical mass of new development: Uxbridge

5.0 Character Remedies

"Improvements to the environment, particularly for pedestrians, help to make the centre a more attractive place to visit."

5.1 Challenges

There is considerable evidence that the physical environment of a town centre and its image or perception by users and investors determines to a large extent its success as a retail destination. There are often a number of elements that define the unique character of a place which, if creatively exploited, can also give it a competitive edge.

The survey identified a range of issues that respondents felt either reinforce the character of towns and smaller city centres as unique retail destinations, or detract from them.

Physical environment

The quality of the physical environment of town centres is a key concern for those trying to make them successful. The quality of the public realm, the problems and opportunities presented by listed buildings, and the impact of 'modern' developments on the existing urban fabric are the key challenges that town centres have to face.

- **Public realm quality** – the research revealed serious concerns surrounding the poor quality of the public realm in many smaller centres, leading to a loss of pride in the local environment, compounded by a loss of public amenities such as toilet facilities. Respondents reaffirmed the importance of having a good quality town centre environment with a compact, identifiable and cohesive centre and the 'meander factor' – streets and squares that encourage people to wander.

- **Heritage and 'modern' buildings** – heritage issues present themselves in the challenges and opportunities that come with a significant presence in many small centres of listed buildings and historical street patterns. Equally, many places have to deal with the problems of a legacy of 1960s and 1970s urban interventions and shopping centre design. In both cases there is a perception that retail development can benefit a town centre's character through reclamation, refurbishment or environmental improvement of derelict or badly designed areas in or adjacent to the town centre. Regenerating or finding new uses for historic buildings or listed buildings at risk is seen as particularly important in this regard.

- **Space constraints and land assembly problems** – a major area of concern was the lack of space to accommodate new development due to the topography, historic character or simply the compact nature of smaller centres. Respondents confirmed that it is particularly difficult to accommodate developers' 'big box' and surface car park requirements within historic centres and this gives rise to a shortage of the larger units needed to meet multiple retailers' requirements. Moreover, it seems that the lack of readily available sites extends development timescales. This is often made more complicated as a result of land assembly problems: multiple ownerships, upper floor issues, competing land uses and difficulties with the CPO process. As one respondent complained:

"We are still sorting out various CPO claims resulting from the site assembly process for the Wellington Square shopping centre almost ten years ago – the centre has been open for three years now. You have got to be sure you have funds set aside for these claims, long after the development is complete."

It was even suggested that the smaller sites more readily available in smaller centres may not be large enough to attract high quality, experienced developers capable of delivering the sensitive design required.

- **Effects on the retail footprint** - there was also a concern that even carefully designed and context-sensitive new developments can have unintended adverse effects on the retail core. Evidence from some of the cases showed that retail development could lead to a migration of existing traders from other locations within the town / city, resulting in a repositioning of the core retail footprint and reduced footfall in the parts that had been deserted. In this context, maintaining the viability of the whole town centre and filling vacant units seems particularly problematic.

Image and perception

'Character' is not only related to the physical attributes of an area, but also to how people interpret and perceive those attributes. For many local authorities, the need to promote a positive image for their town or smaller city centre was seen as a priority in order to develop a strong and distinctive identity, attract tourists and create awareness of what is on offer. Equally, the need to address the negative preconceptions compared to competing towns was highlighted. Thus the challenge for local authorities, retailers and the town centre manager was seen by one respondent as to "create a positive view from local and other people, and reduce the local 'grass is greener over the hill' feeling."

Part of the image of a town centre is related to crime and the fear of crime. A concern mentioned by a number of local authorities is the need to address actual crime, the pre-conceived fear of crime, and several forms of anti-social behaviour and make the centre feel safe for shoppers and retailers. This seems to be a particular issue for smaller centres which are keenly promoting evening activity. For some, the new *Licensing Act* is seen as a possible source of future problems for town centre safety.

5.2 Remedies

Many towns and smaller cities seem to be responding well to the challenges identified above, taking advantage of their unique character to consolidate or improve their position as a retail destination.

Town centre quality

Enhancing the town centre environment through sustained investment in high quality urban design, streetscape improvements and enhancing the public realm was seen by many local authorities as a first step to making the centre more attractive to shoppers and retailers. As one respondent put it "Spend real money on creating a first class and coordinated public realm – paving, seating, lighting, landscaping. It is one of the most dramatic ways of maintaining and building civic pride".

The message from the more successful towns and cities seems to be that town centre improvements should be sympathetic design-led solutions, involving attractive architecture, good urban design and the co-ordination of initiatives to encourage 'place creation'. The need for investment in the maintenance of the physical environment was also identified as a priority. While it might be difficult for smaller centres to compete with the standards of maintenance of major enclosed retail schemes, they should try to be comparable in terms of the quality of the pedestrian environment and general cleanliness.

Heritage solutions

The research confirmed the view that sensitively used historical environments can provide a valuable tool in reinforcing the character of a place and giving it a competitive edge. There is support for the removal of VAT on the repair or maintenance of historic buildings to bring them into line with new buildings as an important incentive to bring back into use at least some of the under-used fabric of historical centres and to encourage refurbishment rather than redevelopment.

Heritage: Digbeth Arcade Walsall

Investing in the public realm

The state of the physical environment in Clydebank was poor and it required investment before any major retail-led development projects would be feasible. West Dunbartonshire Council in partnership with CIS invested £21 million in the Clyde Shopping Centre improving flooring, roofing, lighting, public realm, signage, means of access and increasing car parking provision. This investment has increased trade, attracted new retailers and reduced vacancy levels, and has subsequently focused attention on the remainder of the town centre that is now receiving similar investment.

"**Improvements to the environment, particularly for pedestrians, help to make the centre a more attractive place to visit.**"

White Hart development – Mansfield

Although the vast majority of respondents to the survey supported retaining a strong national policy against new or expanded out-of-town developments, there are always exceptions that justify a different approach.

The need for flexibility

Although there is not a huge demand for additional retail space at present, the problem for Carlisle is that there is very little land in the centre and secondary retail and industrial uses are being squeezed out by residential development. The Property Department believes that Government policy is constraining development opportunities and creating traffic problems, leading to a distorted market for land. For them, the resistance to out-of-town development is constraining the local authority to such an extent that they can no longer act strategically. They argue "If we could build a new retail warehouse on the edge of the centre some of the bulkier retailers would move out, freeing up space to attract new retailers to the town".

Using the heritage dividend

The Townscape Heritage Initiative in Mansfield is regenerating an area adjoining the town's marketplace for niche retail. Although the area is now partly derelict it contains a large number of Mansfield's listed and unlisted historic buildings, and a number of specialist shops. Developers have recently been appointed to deliver the White Hart Development Masterplan which will see restoration of older buildings and sympathetic new build to provide a range of smaller-scale retail units. The development is intended to complement, not compete with, five other mixed-use schemes around the centre, two of which are retail-led, which will together enhance the overall attraction of the town centre. The White Hart Development will be supported with high quality public realm improvements and the establishment of a heritage trail that will link this area to other areas of interest in the town centre.

To overcome the widely recognised space restrictions, the research identified a proactive role for local authorities in the acquisition of 'brownfield' sites within town centres to provide appropriately sized retail units that meet the needs of retailers. However, because of the limited availability of such sites of sufficient size in smaller centres, local authorities also need some flexibility in the way they can interpret brownfield rules.

Movement of the retail core

Solutions identified to deal with migration or repositioning of retailing in town centres ranged from investing in pedestrianisation and environmental improvements to finding financially viable alternative uses for deserted areas.

Re-inventing rather than resisting change

Phase I of the Lanes shopping centre in Carlisle was restricted to 250,000 square feet because of concerns that it would concentrate retail activity in the north away from the Botchergate area in the south. The Botchergate area was declared a conservation area, but following development of the Lanes, the very tertiary retailing in the area was no longer viable. Instead of continuing to use the conservation area status negatively to preserve what was already there by withholding permission to re-develop, a more flexible approach was devised, and in the late 1990s the area became the new commercial leisure quarter and focus for the city's night time economy. Today it houses a Bingo Hall, cinema and restaurants, pubs and fast food outlets.

New retail development can also be deliberately located to entice more shoppers back into the original town centre. In Irvine, for example, it is hoped that development in the pipeline will improve the range of retail outlets in the town and promote

competition. It should also address the current geographical imbalance and hopefully bring more shoppers into the old centre, thus enabling the regeneration of this area.

Managing the public realm

Many of the more successful cases seem to be dealing with the issue of image and perception as the fundamental basis for active Town Centre Management, and in the future for BIDs. Bespoke marketing at local and regional levels is being used to emphasise the strengths of particular centres, and to attract tourists and visitors. The research suggested that this should be a positive and proactive role of the council, but must be in partnership with others with an interest in the ongoing management and development of the town or city centre.

On the issues of reducing crime, the fear of crime and antisocial behaviour, local authorities noted the value of specific government initiatives.

A reassuring presence

Bradford have introduced a number of crime reduction measures which are now proving successful. City centre wardens are employed by the council but work alongside police officers and community support officers as their 'eyes and ears', reporting crime and antisocial activities. They also have an environmental reporting role identifying problems like rubbish and graffiti. There is an extensive CCTV system covering the whole of the town centre and the city was one of the first places to introduce a vehicle number plate recognition system which recognises every car coming into the city centre, successfully identifying vehicles which have been stolen, used in robberies or have outstanding fines. These measures have proved successful, fear of crime has dropped by one third in a year and the reassuring presence of the city centre wardens has made older people in particular feel much safer.

Heritage: Richmond

5.3 Carlisle – Working with character

Carlisle is an historic city which had been losing retail trade, despite its relatively isolated catchment, in part because of the lack of larger retail units needed to attract key multiple retailers. The shopping area had grown up in a linear fashion along the A6 stretching for over a mile from Scotch Street in the north to Botchergate in the south.

Inside The Lanes – phase one

A shopping survey conducted by Donaldsons found that since the early 1950s Carlisle had slipped from 69th in the hierarchy of British shopping centres to 130th. Turnover per square foot was low, as was growth in durable goods sales. Indeed there was a lack of both choice in durable goods and key national retailers which was resulting in retail leakage to Newcastle (58 miles away) and to smaller towns in the city's sub-region. New retail development was therefore urgently needed.

Halting and reversing decline

The Lanes, an area of alleyways and poor quality back-to-back housing located behind the northern part of the shopping area had been identified for redevelopment in the 1950s, and narrowly escaped a series of unsympathetic proposals during the 1960s and 1970s.

The first phase of The Lanes Shopping Centre was developed in 1984, successfully attracting new retailers to the town. It was restricted to 250,000 square feet because of concerns that it would concentrate retail activity in the north of the town centre, away from the Botchergate Area in the south, but by 1989 the council was convinced of the need to extend the Lanes. This was delayed by the stockmarket crash until Somerfield food store wanted to give up their lease and Donaldsons advised that Debenhams would be interested to come to Carlisle, provided the scheme could be completed by 2000. The second phase of The Lanes

involved the removal of the food store and one level of parking and construction of a new mall containing larger shop units linking to a new Debenhams store. The scheme opened in 2001, and following heavy initial incentivisation, all the shop units were let.

The Lanes now consists of 500,000 square feet of retail space. It has created much bigger units and attracted new retailers to Carlisle, transforming the retail performance and confidence of the city. The centre has now risen to 77 in the Experian retail rankings (2000-2002). The development had an adverse effect on secondary retailing in the Botchergate area, discussed earlier in this chapter, but this area has now become the focus of the evening economy.

The role of the council

The council was, somewhat unusually, the developer of the first phase of The Lanes. This approach exposed the council to financial risk and required strong leadership by politicians and officers, particularly in view of a history of setbacks on the site. This brave decision, taken during a time of recession, paid off, bringing in significant revenue and capital receipts to the local authority. More significantly it meant that the council was able to control directly the quality of the development in terms of the materials used, the design principles and the mix of development – although the funders were not prepared to consider an open mall, the council's initial intention.
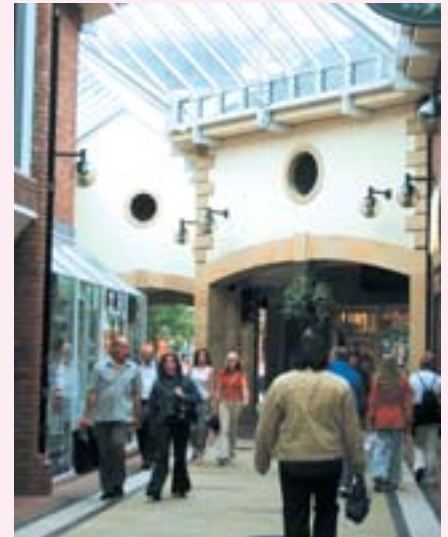
The council compulsorily purchased the whole site with the intention of retaining a controlling interest in the development. To achieve this, the council gave General Accident a head lease and took the site back as an under lease, developing the scheme subject to a development agreement with General Accident.

By the time of the second phase of the development, local government capital control regulations would have made it difficult, although not impossible, for the council to act as the developer. The council had a good working relationship with Morley (the development arm of CGNU which had taken over General Accident), and were happy to proceed with Morley as the developer. However, this meant that the council was in a less strong negotiating position on the second phase and was only able to exert control on the design process in its capacity as the landlord and planning authority.

Morley bought out Somerfield's lease and the council compulsorily purchased the remainder of the site and sold the whole Lanes development to Morley on a 250 year long lease. The council nevertheless retained an equity share geared to the rent roll, so as rents go up the council

takes a slice without incurring the capital costs of refurbishment. The equity share of the entire development is expected to bring in more revenue than the previous arrangement.

Design principles

The design for Phase I was highly sympathetic reflecting the historic character of the Lanes - a variety of 2-3 storey buildings, intersected by small lanes. The entrances are narrow ground floor openings with no spectacular atria, and the lanes themselves were replicated inside the shopping centre where high quality external materials were used to suggest an external rather than an internal environment. This illusion is supported by lightweight glass roofing and natural light. The internal lanes are rights of way which are kept open 24hrs a day maintaining linkages through the centre. As the Commercial Director noted "People don't notice that the Lanes is a shopping centre, they actually ask when the roof was put on because they think it is a covered street".

Whilst open to the criticism of pastiche, the elevation to Scotch Street / English Street consists of shops with flats above which mask the bulk of the development behind and mirror the original buildings opposite. The intention had been to retain more of the original buildings, but due to neglect resulting from over 30 years' delay in redevelopment, a group of four Grade II Listed buildings had to be demolished because they were unsafe.

Despite the success of the first phase, phase two of the development adopted an entirely different 'anchor store' design approach. The mall extension is artificially lit and less street-like because it is built underneath the multi-storey car park, and rather than attempting to conceal its bulk, the new Debenhams store was designed to reflect the city's massive red sandstone castle and citadel and act as a 'full-stop' to the development.

Summary –
How can retail-led development be accommodated in an historic centre?

- There is a proactive role for local authorities: identifying suitable sites for development and using CPO powers for land assembly.
- In acting as developer, a local authority can control the design process much more effectively than through planning powers alone.
- Historically sensitive design involves retaining street frontages, concealing the bulk of the development, not providing large entrance atria and maintaining linkages as public rights of way.
- Adverse effects on retail footprint can be addressed by finding new uses, such as leisure, for deserted areas.

The Lanes

Inside The Lanes – phase two

External finishes used inside The Lanes

5.4 Lessons

The physical environment of a town centre and its image or perception by users determines, to a large extent, its success as a retail destination. An indifferent public realm, a mixed legacy of buildings and urban spaces, a lack of space to accommodate modern retailers' requirements and a poor image have undermined the ability of many centres to compete, which has resulted in potential assets unique to them remaining underused. The research suggested a number of general lessons about how retail-led developments can reinforce the character of a town centre.

Urban design and public realm improvements

- Enhancing the town centre environment through sustained investment in high quality urban design, streetscape and public realm improvements was seen by many local authorities as an essential first step to making the centre more attractive to retailers and shoppers.
- Where retail development has altered the retail 'footprint' of a town centre, investment in pedestrianisation and environmental improvements can help areas suffering from reduced footfall, and financially viable alternative uses can be identified, such as leisure.
- The research confirmed the view that sensitively used historical environments can provide a valuable tool in reinforcing the character of a place and giving it a competitive edge. Retail-led development in historic town centres requires sensitive design approaches which go beyond simply accommodating retailers 'big box' and surface car park requirements. Sensitive design solutions which re-write the received rules of retail development by retaining street frontages, concealing the bulk of the development, not providing large entrance atria and maintaining linkages as public rights of way, can be commercially successful.
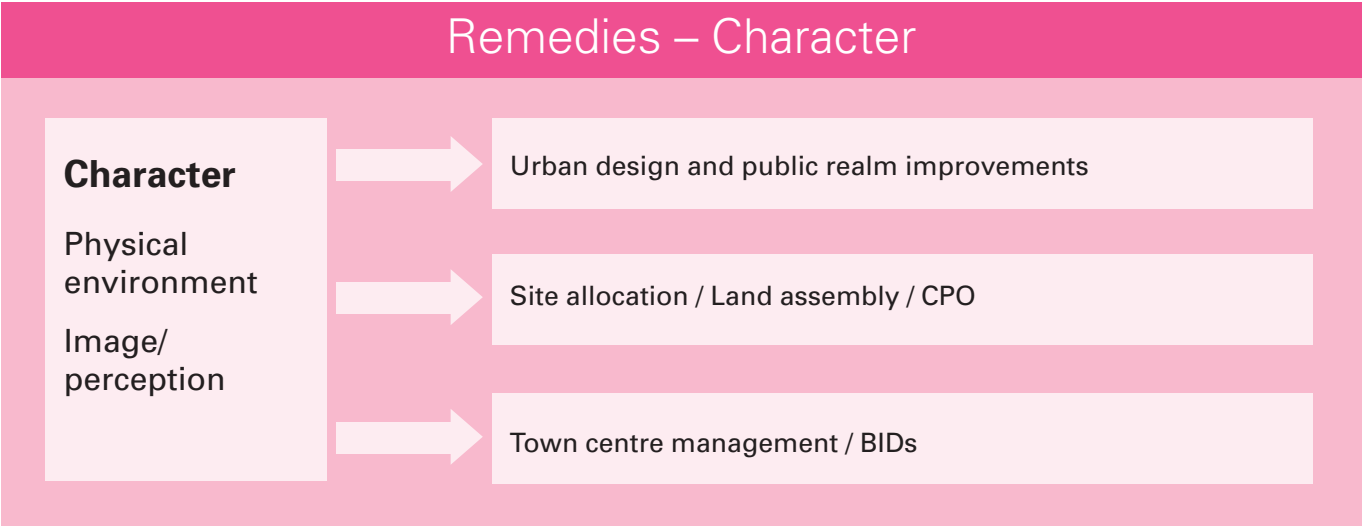- Removal of VAT on the repair or maintenance of historic buildings would provide an important incentive for the use of at least some of the existing fabric of historical centres in the redevelopment they need.

Site allocation and land assembly

- The main problems associated with retail-led development in smaller centres are space constraints (lack of developable sites, land ownership and assembly issues). These can be dealt with through a proactive and flexible approach from local authorities but some flexibility on the application of brownfield rules may be required to enable strategic provision of sites for retail-led development.

Town centre management / BIDs

- Improving the image or perception of centres requires active town centre management, and in the future BIDs, delivering bespoke marketing at local and regional levels that emphasise the strengths of centres.
- Specific initiatives to reduce crime and antisocial behaviour and higher visibility policing, providing reassurance to shoppers, are important to convey an image of a safe environment, as are an investment in the high quality management and maintenance of public space.

Remedies – Character

Character

Physical environment

Image/ perception

→ Urban design and public realm improvements

→ Site allocation / Land assembly / CPO

→ Town centre management / BIDs

Carlisle: hiding the 'big box'

Carlisle Air Images

6.0 Choice Remedies

"There's no substitute for a diverse range of quality retail within a town."

6.1 Challenges

The range and quality of the retail offer, together with the mix of uses available in a town centre, will determine to a great extent how it performs. A centre offering a wide enough range of shops and goods, and with a number of other activities to complement retailing, will be in a much better position to attract custom and investment.

The research looked at how smaller centres are dealing with the need to diversify their retail and land use mix. Issues focussed on the range and quality of the retail offer, and on the integration of other uses.

Range and quality

The range and quality of the offer relates to the retail mix – the selection of shops, both national and independents – available within a centre. There is a general acceptance that town centres need a critical mass of retail including: a good choice of traders; a range of quality of outlets; and a range of specialist traders and smaller niche retailers to provide sufficient product range to meet the requirements of their local catchment.

Many localities were concerned about issues of range, generally referring to a centre's ability to attract new major national retailers, particularly department store anchors, to strengthen a centre's retail offer and establish critical mass. There was a lesser concern with a centre's ability to maintain and support a healthy independent sector to reinforce its local identity. In many places there is also a concern about the perception of having a poor quality retail offer (high numbers of lower order shops) and consequently with their ability to attract higher end retailers: "We need to attract significantly more quality retailers capable of boosting the city centre's image and visitor attraction potential".

Many local authorities stressed the need to achieve development in scale and balance with the town's existing retail offer, and expressed concern that retailers are not necessarily willing to respond to the local context. In some places, there are specific concerns about the ability to retain independent retailers and over the number of vacant or non-retail units within smaller centres. Changes of use of A1 units to A2 or A3 were also a concern.

Mix of uses

Retail-led development projects can be too narrowly-focussed on retail provision; indeed a poor mix of uses, particularly in terms of attractive and vibrant leisure facilities like cafes and restaurants, was identified as a significant issue by some respondents: "There is a general lack of diversity and variety, a limited range of leisure, employment and retail types, and no housing in the centre".

Most local authorities see the benefits of mixed-use development in terms of providing new facilities like a cinema, bowling alleys, restaurants and so forth, allowing development of the evening economy, increasing the number of residents in the town centre and providing social housing. However, most acknowledged that there are problems with getting mixed-use development off the ground. Developers in particular seem reluctant to embrace mixed-use and sometimes to develop more than single storey schemes. This, unfortunately, is more of a problem where demand is low and local authorities need to attract development. It all too easily leads to a culture of 'anything goes'.

A salutary tale

In Scarborough, at the time of the research, a retail warehouse store was under construction very close to the High Street. Despite the fact that the council was offering housing money to fund building flats above, or alternatively the DSS would have provided a guaranteed tenancy for office space above, the developer would only consider a single storey development. The upshot is a single storey development with a three storey false façade like a Wild West film set which contributes nothing to town centre vitality.

There are also specific problems associated with the antisocial aspects of developing an evening economy. As one leisure venue owner put it:

"The Government is encouraging more and more bars to open up. This may be building up the night-time economy but more competition means each venue needs to ensure they get their share of punters' money and that means promotions that encourage binge drinking like 'five bottles for £5'. It's a volume game and we all need the turnover."

In many places real difficulties were reported in encouraging activities, in addition to retail development, that would support town centre vitality. Establishing and consolidating a night-time entertainment industry, developing a cultural offer, and accommodating the pressure for housing were all challenges facing attempts to develop a viable mixed-use town centre that the survey highlighted.

6.2 Remedies

Most respondents saw the promotion of the opportunities presented by the centre as the best solution to enhance choice within town centres. This involved the targeting of suitable retailers and key anchors to provide a different offer and the development of retail-led schemes to expand available floorspace.

Refining the retail offer

Retail-led development can improve retail choice by increasing floorspace and providing larger store units suitable for modern requirements, allowing expansion and enhancement of the retail offer and attracting new retailers not previously represented in the town centre. Many smaller centres have taken advantage of development opportunities to raise the standing and reputation of their town centres. Respondents noted that retail-led regeneration inevitably focussed on attracting department stores and high quality multiples, and on improving representation from traders that were not well represented. However, this is not always a straightforward gain, and many pointed to a trade-off between attracting new retailers and the likely displacement or closure of existing business, especially small independents, that can result.

However, as one department store operator commented: "Going into towns without department stores stops retail leakage", a view that is widely held, and which reinforces the competition that exists between centres to attract department stores. Nevertheless, most of the successful cases identified during the research have striven to maintain the individuality of their town centres. As their experience suggests, an appropriate retail mix, including key anchors, multiples and independent retailers, offering a selection not available elsewhere, and a vibrant leisure offer, can make shopping a pleasurable experience, as well as making economic sense.

"Astute property developers are recognising the benefits of retail diversity. We are prepared to manage our centres for the overall retail mix; we don't insist on 100% multiples. Independents create a bit of novelty and offer something different. They are more risky because the income is not guaranteed in the way it would be with a Listed Company but they add to the overall experience."

Café society

"There's no substitute for a diverse range of quality retail within a town."

Fashion choice

On the issue of holding onto and recruiting national and international companies into high street locations, the research suggested that this can best be achieved by incentives, altering development plans to allow new developments in town centres, and by proactively implementing CPOs where necessary. Inevitably, however, there will not be enough department stores (or even multiples) to go around, and some towns and smaller cities will have to develop strategies that manage without. In such places, developing a strategy to differentiate themselves by attracting high quality independent retailers might prove fruitful.

Taking an independent line

Rugby was suffering from up to 80% retail leakage. The catchment is very affluent but residents tended to shop elsewhere because the town did not offer a critical mass of fashion and lifestyle shops. The local authority conducted research that identified what ABC1 customers thought was missing from the town centre and has developed a strategy to create a new shopping experience which is specifically targeted at these requirements.

As a result, Rugby has already attracted new multiples such as Monsoon and Bay but the council specifically wanted to avoid building "just another 'clone' town" as they put it. To avoid this they are concentrating on expanding the independent sector, in part also to utilise the large number of smaller shops which the multiple retailers are not interested in. So far, the efforts have succeeded in attracting over 20 new independents to the town centre. These are mainly up-market fashion, jewellery and designer furnishing shops. They are performing incredibly well and leakage has dropped to 60%.

Although the authority recognises that they still have some way to go, they believe they know how to solve the problem. Significantly they have made the decision not to compete directly with local large towns and cities, but to offer a point of difference which is a clean, safe and friendly environment where you can buy something different. "We have a master plan / vision for the town centre agreed with the local and county councils and, believe it or not, we are all singing off the same hymn sheet, hence our progress."

Investors and developers are also realising the value of choice, in order to offer something different for their customers. For example, in Bristol, Morley Fund Management have moved beyond the normal landlord / tenant relationship in their shopping centre, and are working in partnership with their independent tenants, nurturing them in off-pitch locations and bringing them on into bigger units when viable. Benefits are apparent on both sides.

Attracting other uses

The case studies suggested that retail development is not always the solution, as town centres need a mix of uses and flexibility to adapt to changing markets. In this regard, exclusively retail schemes will not help to build the town centre into the real 'heart of the community'. Towns and smaller cities need to develop a stronger all-round offer of town centre activities so that the town centre is attractive and more vibrant. In the more successful town centres, leisure activities, housing, office space, good quality public realm, and facilities and amenities are key constituents of the mix that secured that success.

However, the difficulties in producing mixed use schemes are real and there is a perception that financial support for these schemes should be made available by Central Government to enable local authorities to subsidise developers if mixed-use development is not viable. Authorities also need to consider the level of Section 106 payments required in such circumstances.

Developing the leisure economy

Complementing their independent retailer strategy, Rugby have for some time taken the view that the night-time economy is as important as the day-time economy. As a consequence, they have succeeded in creating a real café society in the town. The permissive and encouraging approach of the authority has delivered a good range of cafes, bars and restaurants which appeal to the ABC1 catchment, in a way that the retail offer, as yet, does not.

A department store, but there will never be enough to go around

Case Study **St Helens**

6.3 St Helens – Expanding choice

St Helens developed very rapidly during the industrial revolution based on coal and glass, but industrial decline hit hard during the post war period and at one stage unemployment was 7-8% above the national average, although it is now only slightly above. However, low aspiration levels remain as the cultural legacy of having up to four generations who have never worked, and the population is declining as the best and brightest go elsewhere.

By 2000 the town had dealt with its extensive dereliction problems and the challenge was how to reposition St Helens for the future. In 2002 the town was invited by the RDA to bid for the City Growth Strategy Programme. This is a Treasury backed initiative that originated in the USA. The basic ethos is to involve the private sector to devise future economic development plans and to focus on competitive advantages rather than concentrating on addressing weaknesses.

A City Growth Strategy (CGS) board was set up with 13 of the 16 members coming from the private sector and research was commissioned into the town's business base to identify key growth clusters and 50 projects ranging in size from £100m to small marketing initiatives to drive wealth creation in the town. Development of the town centre features prominently within the tourism and leisure growth plans. The town centre partnership has been recast with new membership fees, a more aggressive budget and a more dynamic programme of marketing and events and £4 million has been set aside for public realm improvements.

The role of retail-led regeneration in St Helens
Initially regeneration of the town centre was retail-led. It was kicked off by the redevelopment of the former Ravenshead glassworks on the edge of the town centre as a retail park. Although this site is within walking distance of the centre it does not take trade from the centre because there is little or no commercial conflict. An Ecobus has also been introduced to bring shoppers to and from the town centre. The next phase of redevelopment will see development of a new rugby stadium together with a casino, retail and leisure development. This will be funded by relocating an existing supermarket in the town centre and its replacement with comparison shopping. It will improve the comparison shopping offer available within the town centre and possibly attract another department store.

In the future, the regeneration role of retail is likely to be superseded by housing-led development. This is partly as a result of capitalising on the increase in land values as St Helens is repositioned as a place where people want to come to live.

Tyrers department store

A strong independent retail sector
St Helens has a strong independent retail sector. Despite the town's relatively poor catchment area, this includes a good selection of up-market retailers that draw in customers from the wider surrounding area. There is a high class, fiercely independent, department store – Tyrers – which is currently in the hands of the fourth generation of family management and has recently undergone a major refit, and the Church Square Shopping centre also houses independent jewellers and fashion outlets. As its manager comments:

"Independents are higher risk but it is all about being selective and getting the right ones for the shopping centre."

The success of these independent retailers may be because the centre is highly accessible from the motorway, and shop rents are lower than elsewhere in Merseyside. Undoubtedly also, Tyrers creates a critical mass of up-market retail attraction which brings shoppers to St Helens. The town, for its part, is active in the work of the Retail Academy based at Manchester Metropolitan Business School which provides education and research to support independent retailers.

Leisure and the night-time economy
St Helens benefits from the World of Glass visitor attraction, a Lottery funded scheme. However, the City Growth Strategy research revealed that the town has a critical mass issue as a leisure destination: it is not sufficient to have a half-day venue and another attraction is needed if the town is to stand a chance of getting visitors to stay overnight and really increase their spend. This has led to the proposals for a new stadium and a leisure-based entertainment centre.

The town's multiplex cinema based in the town centre has gone some way to catalysing a night-time economy in the

town centre, but the local authority has also developed a pavement café policy to encourage pavement trading. The town centre already has a pubwatch scheme and a dedicated police inspector.

Lantern parade

Developing the public realm

Full-scale pedestrianisation has been resisted in favour of allowing access to buses and taxis which helps to provide animation and increase safety at night. Public funding has also been used too transform the George Street area, formerly a semi-derelict area of car showrooms and a focus for antisocial behaviour, into a cultural quarter. This includes the Catapult Centre, as a new centre for creative industries. Funding has been used to create new public space and for streetscape improvements, setting the urban design benchmark for future developments in the town.

Regarding the management of public space, St Helens is largely a safe place to shop, with a non-aggressive atmosphere. There is a town centre shopwatch scheme with 180 members connected to a live radio link, and the scheme is linked to the council's CCTV suite and to the police. Aiding the situation, there is no division between town centre and shopping centre security, removing 'not my patch'

issues. The town is currently seeking 'Safer Shopping' accreditation from the British Retail Consortium; a scheme that recognises achievement in standards of partnership work and provides the documentation which helps partnerships to work safely and within the law.

The town centre management agenda in St Helens has also moved on. It is no longer just about networking and liaising and issues of cleaning, greening and safety, but now puts considerable effort into 'place marketing'. In particular, managers are putting a concerted effort into organising events which are out of the ordinary and which, they hope, will turn local people into tourists.

Speeding up the planning system

The town is trying to make sure that planning keeps up with its regeneration efforts. The Senior Planner in charge of Town Centre Developments commented:

"The big new retail-led schemes in the pipeline will be running in parallel with changes in the planning process and we need to ensure that the LDF is sufficiently far advanced to allow the stadium project to go forward. We are concentrating on progressing the Town Centre Strategy to help with this, as this will allow us to redefine the town centre and overcome potential problems with PPS 6 as the stadium site is currently technically out-of-town."

World of Glass

George Street

Summary –
How can choice be expanded through retail-led development? And how can this be done without damaging existing independent retailers?

- Implementing a retail-led regeneration strategy and using retail development to fund expansion of the town's leisure offer

- Establishing and supporting a critical mass of independent retailers

- Careful management and marketing of retail areas

6.4 Lessons

The range and quality of the retail offer and the range of other uses, particularly leisure, available within a centre define a centre's ability to attract shoppers. Expanding the choice of goods and services available in towns and smaller city centres can be an effective way of securing the vitality and viability of those centres. Town centres can differentiate themselves based on the choice they offer to customers. An appropriate retail mix, including key anchors, multiples and independent retailers, and a vibrant leisure offer, can make shopping a pleasurable experience.

Targeting multiple retailers

- Towns and smaller city centres have found it hard to provide a critical mass of retail to deliver a sufficient product range to meet the requirements of their catchments and face the challenge of larger and more diversified competitors. Town centres need a critical mass of retail: a good choice of traders; a range of quality outlets; and independent or specialist traders and smaller niche retailers to provide sufficient product range to meet the requirements of their local catchment.
- Holding onto and recruiting national and international companies into high streets can be achieved by incentives, altering development plans to allow development of town centres, and using CPOs if necessary.

Independent retailer strategies

- Independent retailers add to the character and vibrancy of a centre. They are most likely to be negatively affected by new retail-led developments, and strategies to retain and support an independent retail sector should be devised. This could include an appropriate management scheme for areas in which they are concentrated.

Retail-led development

- Retail-led development can improve retail choice by increasing floorspace and providing larger store units suitable for modern requirements, allowing expansion and enhancement of the retail offer and attracting new retailers not previously represented. This can raise the standing and reputation of the town centre, particularly in cases where this includes provision for a reputable large scale retailer such as a department store.
- However retail-led development projects should not be narrowly-focussed on retail provision. Instead, towns and smaller cities need to develop a stronger all-round offer of town centre activities so that the town centre is attractive and more vibrant. This should include leisure, housing, offices, public realm improvements, and public facilities and amenities. Shoppers expect to have a diversity of uses in accessible locations so that both retail and non-retail activities can be combined.
- To overcome the problems of getting genuine mixed-use developments off the ground, there is a need to find funding structures that support them. A way forward could be Central Government funding to enable local authorities or others to subsidise developers if mixed-use development is not viable.

Remedies – Choice

Choice

Range/Quantity

Mix of use

→ Targeting multiple retailers

→ Independent retailer strategies

→ Retail-led development
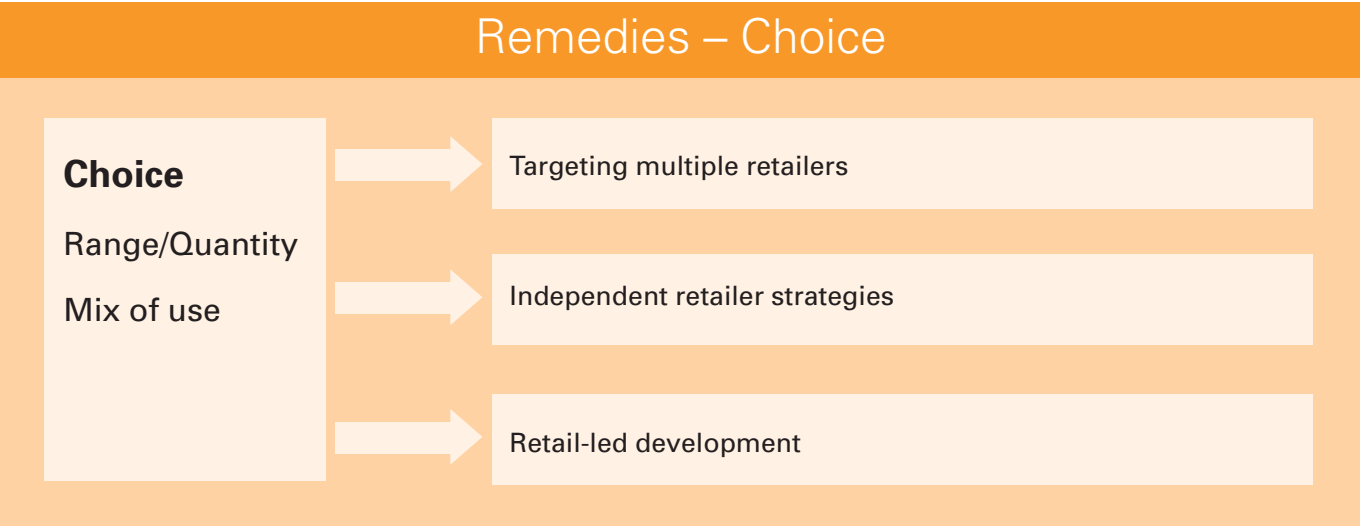
7.0 Convenience Remedies

"It is important that, as an alternative to a nearby major city or regional shopping centre, the smaller centre offers a convenient destination. This particularly relates to access by car, car parking, public transport, congestion and signage."

7.1 Challenges

Good accessibility is a vital ingredient for the success of a town centre. Issues of access by private and public transport, navigability, congestion, and so forth, determine how convenient a centre might be as a destination in relation to its competitors.

From the survey, issues that shape the relative convenience of a town centre can be summarised in terms of parking, access and traffic.

Parking

The main concerns in relation to parking were the supply, cost and quality of car parking, particularly when compared to out-of-town parking provision. Of particular concern is the downward pressure on parking provision within town centres whilst out-of-centre parking seemingly goes unchecked.

Other issues smaller centres have to grapple with include pressures on existing parking facilities during busy periods, the need to strike a balance between additional car parking provision and public transport, and the question of employee parking in town centres.

Access

In relation to access to town centres from their surrounding areas, there is a general acknowledgment that poor road and rail links limit the catchment area of many towns and smaller cities. However, easy accessibility can be a double-edged sword as good transport links can encourage retail expenditure leakage to alternative locations with a better overall shopping environment.

Within the town centre, the layout and the connectivity between its different parts on foot and by bus, train and car was identified as a key access issue. Concerns were also expressed about the quality of links to public transport networks and over the amount, clarity and quality of signage.

"The Disability Discrimination Act is having an impact on the town centre. Many businesses cannot afford to put in lifts and are looking to relocate to units which already have lifts, creating voids in the main shopping area."

On a more specific accessibility issue, the Disability Discrimination Act is likely to have a significant impact on smaller centres and particularly on independent traders who are less able to afford to make the changes needed to incorporate the Act's requirements. This is likely to result in a reduction in the number of shops trading on two floors and possibly to an increase in shop vacancies.

Traffic

The research highlighted a concern over the negative impact of traffic congestion, sometimes as a result of new retail-led developments increasing the amount of traffic coming into a town. On the one hand there are the problems brought about by congestion itself in terms of reducing accessibility and convenience. On the other, there are the negative implications of perceptions of traffic congestion in the town centre or on the periphery, which influences decision-making patterns of shoppers and investors.

Some congestion problems could be ameliorated through investment in the road network, but the lack of funding to support road networks and access was also identified as a significant issue. In many smaller centres, the main problem seems to be one of conflict between the needs of pedestrians and those of vehicles. Reconciling these two needs, to secure a comfortable shopping environment and at the same time to maintain accessibility, is a key challenge.

7.2 Remedies

A number of approaches were identified to making towns and smaller city centres more convenient shopping destinations.

Investing in parking

The evidence indicates that for them to compete effectively with out-of-town locations, car parking in town centres needs to be as good as out-of-town parking, preferably it needs to be free (to the customer), clean, user-friendly and conveniently located. In tackling this issue, councils need to reconcile the additional revenue they receive from car parking fees with the requirement to attract people to the centre. How well this issue is dealt with could make it an effective point of differentiation between centres.

Rationalising and improving existing parking facilities was viewed as an alternative to the provision of more dedicated parking facilities, as was seeking provision of additional parking in new developments, 'stop-and-shop' car parking spaces for quick 'in-and-out' shopping', and park and ride facilities. However, there are no clear-cut answers that fit all locations, and more thought needs to be given to each of these alternatives, for example, regarding how shoppers with a large volume of purchases get back to their vehicles, or

how better links can be forged between the town centre and edge of town park and ride schemes. Innovative examples were found like the St Helens Ecobus.

The experience in some of the case studies suggested that providing park and ride services for employees to free up town centre parking places for short-term shopper parking might be a solution to the town centre employee parking problem. An alternative solution would be a campaign to encourage workers to leave convenient central car parks for shoppers and visitors.

Combating traffic

There is general agreement that traffic congestion would be much improved by more frequent public transport services to ensure that shoppers can get to their destination by high quality bus, tram or rail systems. Bus services, for instance, are relatively cheap and can be improved and made more reliable by real time bus information at all bus stops. The major investments in the suburban bus network in London have significantly increased patronage and helped to turn around views that buses are just for those who can afford nothing better. London's smaller town centres have been some of the first places to benefit.

Single ticketing across transport modes (car parking and bus journey on single ticket) was another possible solution suggested. To maximise efforts to reduce congestion, a partnership of interests needs to be forged between the local council, highways authority, police, local transport operators, and retailers. Those places that were managing the problem had done just that.

St. Helens Ecobus

Walsall bus station

An integrated approach to access

In Hastings an integrated approach has been taken to access and accessibility. The council introduced a de-regulated Controlled Parking Area in the town in 2000. Income from the scheme is used to fund public transport improvements. A Quality Bus Partnership has also been set up with the major local bus operator to improve the quality and frequency of services. Much of the town centre has been pedestrianised in the past few years, and other works have been undertaken to improve the environment for pedestrians whilst reducing traffic in the town.

"It is important that, as an alternative to a nearby major city or regional shopping centre, the smaller centre offers a convenient destination. This particularly relates to access by car, car parking, public transport, congestion and signage."

Access

Some towns and smaller cities have used retail-led development to fund specific projects which would, through Section 106 agreements, remove through traffic, provide better transport accessibility, or deliver facilities such as a new bus station, additional parking or enhanced edge-of-centre convenience retail provision. However, it is acknowledged that not all places can rely on this type of solution, especially those with a more uncertain retail demand, where such funds are few and far between.

Some of the key players interviewed in the research pointed to the need for a national transportation policy that included cars. As a BCSC member puts it: "the challenge is to beat the superstores and retail parks at their own game and make town centres accessible for cars but design for the car in such a way that suits the urban grain".

Park or ride

In Walsall the council has secured funding (of approximately £12 million) through the local transport plan process for 'Walsall Town Centre Transport Package', which includes improvements to the highways around the north of the centre and measures to manage traffic through the centre. Planning permission has been granted for the highway works and the result of a CPO inquiry is awaited. In terms of car parking, recent retail development has provided over 700 spaces on the western side of the town centre, whilst the next scheme is proposed to provide a further 1,500. These car parks are the subject of conditions to ensure they will serve the centre as a whole.

Walsall's award-winning new bus station was completed in 2000 and the council is presently working with Centro (WMPTE) on designs to improve the town centre's second bus terminus. It is also working with Centro on bus 'Showcase' routes. Hand in hand with this, the council is supporting efforts to enhance rail-based access to the centre by metro and/or heavy rail.

Local authorities were also engaged in a range of accessibility projects, often tied to improvements to the public realm, but including improvements to their own town centre property portfolios to enhance access for those with disabilities. A minority of local authorities were working with their highways authorities to develop a shared signage strategy and to promote better pedestrian and cycle networks in their town and city centres.

Enhancing legibility and access

Doncaster are in the process of introducing a legibility strategy that will make the town centre easier to interpret for local people and visitors. This project is going hand in hand with a major review of the council's buildings and land to assess their accessibility and compliance with the Disability Discrimination Act. The investment includes a £230,000 redesign of the main market hall to ensure it is compliant.

"The challenge is to beat the superstores and retail parks at their own game and make town centres accessible for cars but design for the car in such a way that suits the urban grain."

Legible High Street – Walsall

The competition – out-of-town parking

7.3 Bexleyheath – Offering convenience

Bexleyheath town centre is currently performing well and was ranked as the most profitable shopping centre in 2000/2001 by Experian, despite having the massive Bluewater out-of-town shopping centre virtually on its doorstep, six miles away.

Bexleyheath was designated to develop as the strategic centre of Bexley when the borough was formed in 1965. As a result, planning for the Broadway Shopping Centre started in the early 1970s, and the single storey shopping mall, with multi-storey car parking above, was completed later that decade. The scheme was developed by the council in partnership with the Norwich Union, with the council owning 26% based on their land holding. The centre is typical of its era, with a brutal external design, blank walls to the residential areas surrounding the centre, and an artificially lit internal mall. However, the mall has been well maintained and looked after and is extremely popular. It contains a number of major multiples – Woolworths, Marks and Spencer and BHS being the largest.

The threat

When Bluewater was first proposed in the early 1990s there was considerable concern that it would take trade from the town centre. The initial reaction of the council was "we must attract a department store", although it soon became clear this was not a feasible ambition. Reports were commissioned from Hillier Parker and URBED / Donaldsons to establish the extent of the threat and identify possible action. The URBED report of 1997 *Bexleyheath Town Centre: Safeguarding Success*, suggested that 12 to 14% of business could be lost (based on the experience of Romford where retail vacancy rose from 2% to 13% when the Lakeside Shopping Centre opened). URBED recommended appointing a Town Centre Manager to promote the centre, upgrading the public realm, improving lighting and greening, and developing the Market Place as a place to meet, as a location for street cafes, and as a focus for evening entertainment. Most of these recommendations have now been implemented and in 2002, urban framework documents for the West End and Pedestrianised Area have made detailed proposals for a coffee kiosk and covered seating area, an outdoor projection screen, bus shelter, public art and market stalls.

The Hillier Parker report found that, despite the challenge represented first by Lakeside and then by Bluewater, Bexleyheath town centre actually had capacity for an additional 400,000 sq ft of retail floorspace and new retail anchors. A planning brief was produced for a site adjacent to the Broadway Centre then occupied by small shops and the police station. The planning brief was produced at the height of the 1990s property boom, but by the time the scheme had reached detailed planning permission demand had slumped and The Broadway Square development was revised to 200,000 sq. ft. which is now occupied and trading well.

Why is Bexleyheath thriving?

The fundamental reason why Bexleyheath is performing well is that it does not compete directly with Bluewater. Instead, it provides a convenient comparison shopping function. Thus, according to *Bexleyheath Town Centre: Safeguarding Success*, it provides a good range of shops providing a 'basic' rather than a 'quality' comparison retail offer. The emphasis has also been on the need for a quality shopping experience, hence the emphasis on pedestrianisation and the importance of high standards of maintenance throughout the town.

Records of parking charges show that the average visit time to Bexleyheath is just over an hour, compared with 3-5 hours for Bluewater. Moreover, Bexleyheath's catchment shoppers come to Bexleyheath 4-6 times a month, whilst visiting Bluewater, perhaps, once every six months. This is despite the fact that Bluewater is only 6 miles away, parking is extensive and, unlike Bexleyheath, is free.

Bexleyheath town centre

Bexley Council

Football coaching

Council officers argue that, despite free parking, it actually costs (parents in particular) more to go to Bluewater because it is regarded as a day out: children expect treats and visitors tend to eat there, whereas shoppers at Bexleyheath come in, do their shopping and go home in a relatively short period of time. In this latter role, Bexleyheath benefits from being a hub for local transport connection, particularly buses. As well as being a destination, the town benefits from transient shoppers passing through on the way to somewhere else.

Other advantages

Bexleyheath also has a relatively long-established Town Centre Management Initiative, and the Broadway Centre has a Shopping Centre Manager they organise events outside and inside the shopping centre respectively to attract and entertain shoppers, particularly children. They offer events such as a Farmers' Market and a French Market, rides, classical trios, jazz, Punch and Judy and smaller events including face painting and portrait painters. They also organise events designed to bring the local football club, theatre school and educational establishments out into the community (a council objective). These events are intended to encourage longer dwell times and give additional incentives to visit the town centre. Adding to its advantages, Bexleyheath is easily accessible by car and by bus, there is adequate provision of car parking, no traffic queues and good bus services, although it can be difficult to reach by train. Indeed, there are projections for exceptional retail growth in

the town, although the council are concerned that the Mayor of London may attempt to limit the parking, throwing the schemes into doubt. The Head of Strategic Development and Town Centres argues:

"There is a direct link between use of the car and retail spend. For relatively light things like fashion, people are prepared to get on the bus, but not for heavy items like groceries. Neighbourhood shopping worked when Mums didn't work, but it's just not realistic now."

A good quality, safe town centre environment

Bexleyheath is perceived as a safe place, particularly for children where it is perceived to be "somewhere that parents can let go of children's hands". In fact it has the second lowest level of crime in London, and for two weeks recently there were no arrestable offences in the town centre.

A steering group has also been set up to look at the impact of the new licensing law, and there is a Bexleyheath Town Safe scheme, being carried out under the Community Safety Action Zone initiative, to tackle shop theft and target the most prolific criminals through information sharing. A lot of work has been put in by the police, working in partnership with other organisations, including the local Pubwatch.

Finally, the town centre has seen significant investment in the public realm in recent years, and the whole of the centre is clean and well maintained, with a generous provision of flowers in hanging baskets. The High Street was pedestrianised and an avenue of trees planted between 1992-4 to soften it, alongside an attractive Morris Fountain (William Morris once lived nearby) at the entrance to the Broadway Shopping Centre.

Market trader

Town centre event

Summary –
How can a smaller centre thrive despite having a major out-of-town shopping centre on its doorstep?

- Smaller centres can avoid competing head on with an out-of-town centre by performing a convenient comparison shopping function.
- It is vital to ensure that the centre is easy to access by car and bus and has adequate parking close to the shops.
- Investment in the public realm, a programme of events organised by Town Centre Management and safety initiatives can make town centres attractive and friendly shopping destinations.

7.4 Lessons

The research confirms the importance of convenience as a key element in the competitiveness of towns and smaller city centres. Ease of access by car, on foot and by public transport determines how convenient a centre is as a destination in relation to its competitors, as does the all-important provision of parking. The attractions of major centres and the free car parking provided by out-of-town centres constitute major challenges for towns and smaller city centres, often aggravated by inadequate public transport and congestion problems.

Improving parking

• Despite sustainability concerns, smaller centres must have adequate parking in order to compete, particularly with out-of-town retail. The current downward pressure on parking provision in town centres, hand in hand with the lack of control of out-of-centre parking, is exacerbating this issue. Councils need to reconcile the revenue they receive from town centre parking fees with the wider objective of promoting town centre viability. The provision of free town centre parking could become an effective point of differentiation between centres.

• Realistic parking strategies are required which reduce the impact of parking on the town centre such as park and ride schemes, as well as providing parking either in town or on the edge of town, combined with proper links between town centres and edge of town locations. However, there are no clear-cut answers that fit all centres, and thought needs to be given to each alternative to minimise potential problems. Parking strategies should consider the different types of activities and users competing for parking spaces in town centres. The aim should be to free up town centre parking places for short-term shopper parking.

Improving public transport and links to public transport

• Better and more frequent public transport is essential to tackle congestion. Integration of transport modes and convenience of use should be at the forefront of these endeavours. However, if small centres are not to lose their convenience function to out-of-town supermarkets, they also have to be accessible by car.

• Retail-led development could facilitate interventions through Section 106 contributions that would remove through traffic, provide better transport accessibility, or deliver a new bus station or additional parking.

• It is essential that local council and highways authorities share an agenda for improvements in accessibility, including signage, street design, pedestrian facilities and cycle routes.

Access plans

• The Disability Discrimination Act is likely to have a significant effect on smaller centres and could result in increased shop vacancies or a reduction in the number of shops trading on two floors.

• Local authorities should consider what they can do to aid marginal businesses in historic buildings so that they can take the necessary actions to modernise.
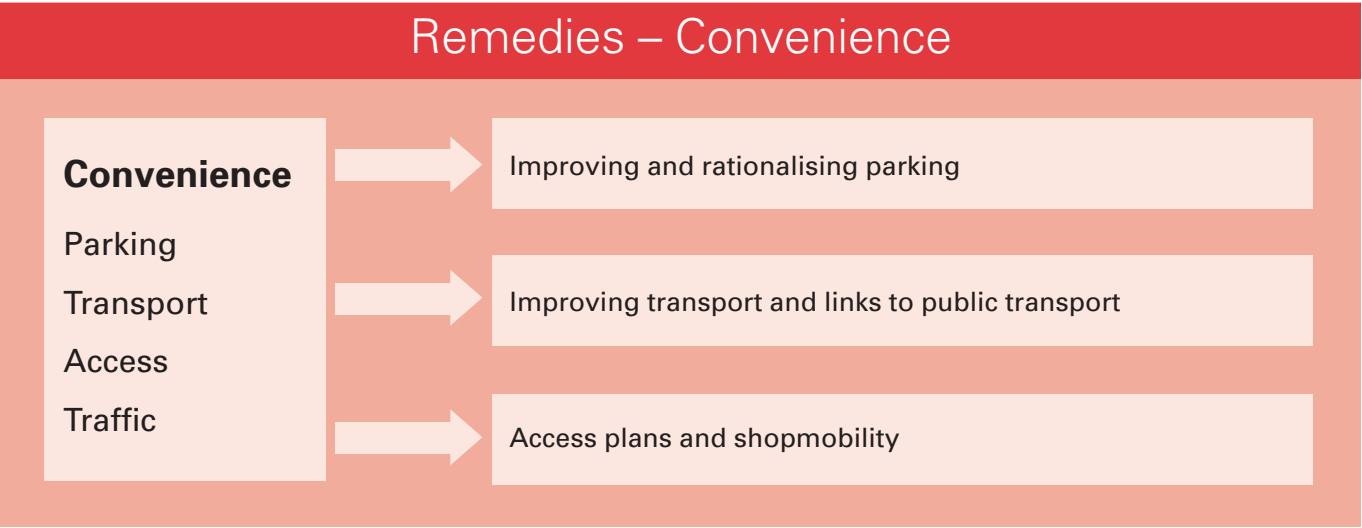
Remedies – Convenience

Convenience

Parking

Transport

Access

Traffic

→ Improving and rationalising parking

→ Improving transport and links to public transport

→ Access plans and shopmobility

"Better and more frequent public transport is essential to tackle congestion. Integration of transport modes and convenience of use should be at the forefront of these endeavours."

Paying for parking

In town parking

8.0 Prescription

8.1 Dispensing the medicine

A range of conclusions emerged from this research relating to the 5 'C's of local town centre performance discussed in chapters 3 to 7. Each, however, has direct implications for the national context – particularly for Government policy – discussed in Chapter 2.

No two places are likely to be the same or require the same set of remedies. The challenge for Central Government is to establish the right national context within which local centres will have the opportunity to utilise the remedies available to them. The challenge for towns and smaller cities is to take those opportunities, and to establish the unique prescription that in their case will deliver a retail-led renaissance.

8.2 The five 'C's

Competition with other centres for custom and investment is the overarching issue determining the success of towns and smaller cities. Polarisation of retail development on major centres has made them more attractive to shoppers, and reduced expenditure in towns and smaller cities. Similarly, as superstores and retail parks move into selling 'high street' goods they also compete more directly with the role of town centres. Smaller towns and cities can therefore find it difficult to attract retail-led investment.

Resisting out-of-town development

- There is a continuing need for strong national polices to restrict out-of-town development and direct development to town centres. PPG6 has effectively curtailed out-of-town development but there is concern that proposed changes to national policy will introduce uncertainly about the locations where retail development will be supported.
- This would be helped by further changes to the *Use Classes Order* to restrict the sale of 'town centre' convenience goods out-of-town, and speedy implementation of Section 49 (of the *Planning and Compulsory Purchase Act 2004*) Regulations to prevent further expansion of retail park floorspace through building mezzanine floors.
- There is also an active role for local planning authorities to protect their town centres by resisting out-of-town development, whilst proactively supporting retail development in town.
- Out-of-town developments should compete on a more level playing field in relation to business rates and car parking. Further consideration is needed at a national level about how this should happen.

Differentiation

- In order to compete with larger centres, towns and smaller cities need to develop a differentiation strategy or a particular reason for users to be attracted to the town centre. Differentiation can

be achieved by developing retail opportunities in keeping with the character and catchment of an individual town, whilst promoting a centre's unique attractions.

Rebalancing the retail hierarchy

- Rebalancing the retail hierarchy, in favour of smaller centres, is a desirable objective, although this is beyond the remit of individual local authorities, and will need to be achieved as part of the new Regional Spatial Strategy process. It may require a more creative approach to spatial planning which goes beyond broad retail functions, by recognising and bringing together the differentiation strategies of individual centres.

Attracting investment

- Local authorities can either adopt a reactive role to attracting investment to their centres by responding to developers' proposals, or make proactive approaches on an ascending scale from identifying and marketing sites, guiding and assisting the development process, to land assembly, or acting as landowner or even as developer. Different approaches are likely to be appropriate for different schemes.

Catchment represents the context through which centres compete for custom and investment. High levels of unemployment and corresponding low levels of disposable income seriously constrain the level of retail investment which is viable in a centre, as does the socio-economic profile of the catchment because retailers use this to identify the towns in which they wish to trade.

Link with wider regeneration

- Having a vibrant and attractive town centre is an important element in the package of economic development strategies to encourage regeneration of an area.
- Demographic trends (smaller households and an ageing population) are likely to benefit smaller centres. However, the limitations of a centre's catchment area can only be addressed through long-term efforts to reinvigorate the economic basis of urban areas and transform the socio-economic profile of their population.
- The links between retail-led regeneration and the wider regeneration agenda therefore need to be made and it is important to understand the demographics which drive consumer demand in a given area. This is a key responsibility of the local authority if they are to establish an achievable vision.
- The retail sector's contribution to regeneration aims is now being recognised by Government, whilst recent changes to the planning system represent an opportunity to establish a much more proactive planning process.

Employment

- Retail development creates employment opportunities (although the net employment benefits of multiple retail development are unproven). Some local authorities have worked with retailers and developers to target these jobs at unemployed and disadvantaged groups, which can contribute to changing the profile of a catchment area.

Strategic planning

- Freeing up land for commercial and housing development, particularly for executive housing, can be a significant tool in rebalancing an area's catchment.

Character of the environment of a town centre can determine to a considerable extent its success as a retail destination. An indifferent public realm, a mixed legacy of buildings and urban spaces, a lack of space to accommodate modern retailers' requirements and a poor image have undermined the ability of many centres to compete, which has resulted in potential assets unique to them remaining underused.

Urban design and public realm investment

- Enhancing the town centre through sustained investment in high quality urban design, streetscape and public realm improvements can be a first step to making a centre more attractive to shoppers and retailers.
- Smaller centres are more likely to have a larger number of historic buildings. Historical environments require sensitive design approaches which go beyond simply accommodating retailers' requirements and can provide a valuable tool in differentiating a place and giving it a competitive edge.
- Where retail development has altered the retail 'footprint' of a town centre, investment in pedestrianisation and environmental improvements can help areas suffering from reduced footfall, and financially viable alternative uses such as leisure can be identified.
- The removal of VAT on the repair or maintenance of historic buildings would encourage their refurbishment rather than redevelopment. This incentive would be particularly valuable in towns and smaller cities.

Site allocation and land assembly

- The lack of developable sites, land ownership and assembly issues constraining retail-led development in smaller centres can be dealt with through a proactive and flexible approach by local authorities, but some flexibility on the application of brownfield rules may be required to enable strategic provision of sites for retail-led development.

Town centre management / BIDs

- Improving a town's image and perception is primarily a role for proactive town centre management, and in the future for Business Improvement Districts (BIDs), delivering bespoke place marketing and crime reduction measures. As they become established across the country BIDs are likely to raise standards of urban management and increase investment in place marketing, making it the norm rather than the exception. Towns and smaller cities should aim to be early instigators of BID schemes to avoid falling further behind their competitors.

Choice – The range and quality of the retail offer and the range of other uses, particularly leisure, available within a centre define a centre's ability to attract shoppers. Expanding the choice of goods and services available in towns and smaller city centres and developing a leisure-based evening economy, can be an effective way of securing the vitality and viability of centres.

Targeting national retailers

- Smaller centres need to achieve a critical mass of multiple retailing in order to provide a convincing comparison shopping offer and prevent retail leakage. Department store anchors and unrepresented or under-represented multiples can be attracted into high streets by incentives, altering development plans to allow development of town centres, and using CPOs if necessary. Local authorities should target the retailers they want, and discuss their requirements in an open and transparent manner.

Independent retailer strategies

- Much of what makes smaller retail centres unique and (potentially) successful are the independent retailers that they have historically catered for. Local authorities should develop an independent retailer strategy in order to encourage a diverse offer, perhaps even as an alternative to courting the limited range of multiples.

Retail-led development

- Retail-led development can improve retail choice by increasing floorspace and providing larger store units suitable for modern requirements. However, towns and smaller cities need to develop a strong all-round offer of town centre activities including leisure, housing, offices, and a high quality public realm, so that the town centre is attractive and more vibrant.
- There is a need to find funding structures that support genuine mixed-use, perhaps through gap funding arrangements that will enable local authorities to subsidise town centre development if mixed-use is not otherwise viable. Alternatively, local authorities should avoid onerous Section 106 requirements in such circumstances.

Convenience – Ease of access by car, on foot and by public transport determines how convenient a centre is as a destination in relation to its competitors, as does the all-important provision of parking. The attractions of major centres and the free car parking provided by out-of-town centres constitute major challenges for towns and smaller city centres, often aggravated by inadequate public transport and congestion problems.

Improving parking

• Despite sustainability concerns, smaller centres must have adequate parking in order to compete, particularly with out-of-town retail. Councils need to reconcile the revenue they receive from town centre parking fees with the wider objective of promoting town centre viability. The provision of free town centre parking could become an effective point of differentiation between centres.

• Realistic parking strategies are required which reduce the impact of parking on the town centre such as park and ride schemes, as well as providing parking either in town or on the edge of town. The aim should be to free up town centre parking places for short-term shopper parking.

Improving public transport and links to public transport

• Better and more frequent public transport is also essential to tackle congestion. However, if small centres are not to lose their convenience function to out-of-town supermarkets, they also have to be accessible by car. A partnership between local authorities and strategic highways/transport authorities will be a prerequisite to make this happen.

• Section 106 agreements can be used as a mechanism to fund a wide range of town centre access and improvement projects. Funds raised in this way should be earmarked for projects that will enhance the long-term sustainability of the retail offer and should not be diverted to other priorities.

• It is essential that local council and highways authorities share an agenda for improvements in accessibility, including signage, street design, pedestrian facilities and cycle routes

Access plans and shopmobility

• The Disability Discrimination Act is likely to have a significant effect on smaller centres and could result in increased shop vacancies or a reduction in the number of shops trading on two floors. Financial support may be required to bring historic units up to modern standards.

• The newly implemented requirement for all major developments to be supported by an access plan may put smaller centres at a disadvantage as public transport operators focus their investment on main routes and larger centres.

8.3 An overarching conclusion

Local authorities need to understand each of the five 'C's in order to decide where their priorities lie and what they will aim to influence: in other words, what their town centre 'mix' should be. The research has emphasised that in order to identify the actions which are appropriate to enable them to compete effectively, smaller centres need to have a vision which brings together an understanding of this mix (the core issues affecting the centre) and identifies the remedies to be taken.
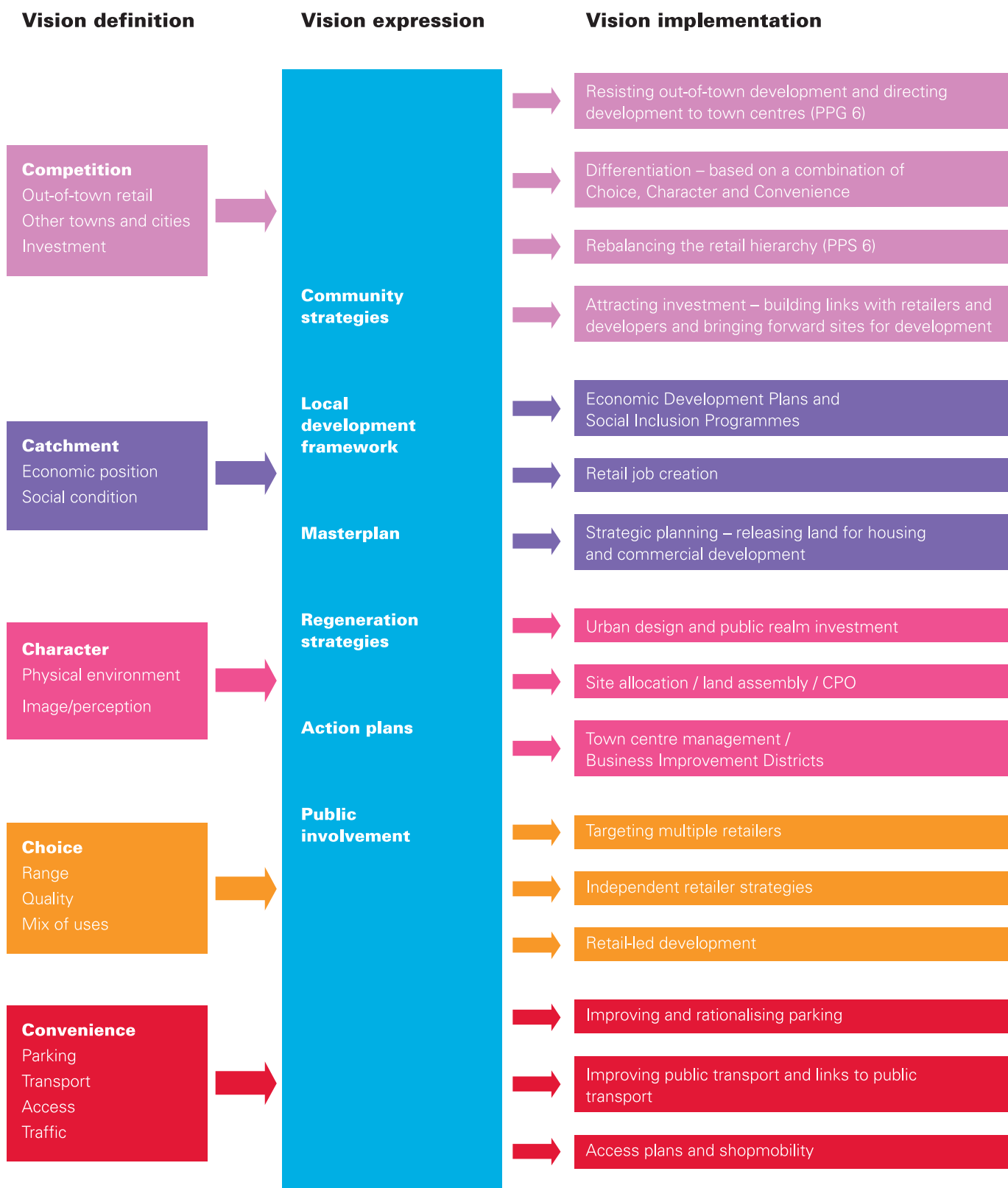
Whilst there are numerous different approaches to town centre visioning, there are also common elements:

• **Vision definition** – identifying the individual 'mix' of issues (competition, convenience, choice, character and catchment) affecting the town / city centre. This process involves research and/or commissioning reports from consultants, stakeholder engagement and partnership working in order to establish the particular vision or role for the town or city centre that will ensure it has a viable future. In other words, what is its 'unique selling point', and how can this be reinforced to attract new investment in the future. There is a requirement for strong local leadership and political will to make this process effective.

• **Vision expression** – the vision can be communicated in a number of different ways through a vision document, a masterplan, as part of the development plan process, or through a combination of approaches. Whichever approach, or combination of approaches, is selected it must involve and have the backing of all key stakeholders. This includes the private sector from where much of the investment will need to come, the range of key public stakeholders, and last but by no means least, the existing community – both residents and businesses.

• **Vision implementation** – the research has identified a toolkit of approaches to turn the vision into reality. What seems clear is that even in those places where, on the face of it, the future looks bleak, much can be done to systematically turn a town or smaller city centre around. This often requires stakeholders with a good deal of determination – both public and private – and a willingness to invest time, skills and resources in the process.

Finally, at each of these stages, a partnership approach is required between local authorities and the retail industry, with both seeking to understand the part they can play in delivering the wider local vision for towns and smaller cities. This should start with an early and sustained dialogue, during which aspirations and constraints can be aired and conflicts resolved. In this regard, the public sector needs to understand the commercial realities of investment decisions, just as the private sector should understand how they can contribute to the broader local agenda encompassed in the local authority's vision. In partnership, real progress can be made;

without it, energy, resources and above all the potential of towns and smaller cities will continue to go to waste. Not everywhere can have the biggest and the best shopping facilities, but

everywhere can be the best that it possibly can be given its unique local context and place within the retail hierarchy. A little bit of retail therapy may be all that is required.

Vision definition

Competition
Out-of-town retail
Other towns and cities
Investment

Catchment
Economic position
Social condition

Character
Physical environment
Image/perception

Choice
Range
Quality
Mix of uses

Convenience
Parking
Transport
Access
Traffic

Vision expression

Community strategies

Local development framework

Masterplan

Regeneration strategies

Action plans

Public involvement

Vision implementation

Resisting out-of-town development and directing development to town centres (PPG 6)

Differentiation – based on a combination of Choice, Character and Convenience

Rebalancing the retail hierarchy (PPS 6)

Attracting investment – building links with retailers and developers and bringing forward sites for development

Economic Development Plans and Social Inclusion Programmes

Retail job creation

Strategic planning – releasing land for housing and commercial development

Urban design and public realm investment

Site allocation / land assembly / CPO

Town centre management / Business Improvement Districts

Targeting multiple retailers

Independent retailer strategies

Retail-led development

Improving and rationalising parking

Improving public transport and links to public transport

Access plans and shopmobility

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Annex 2

Methodology

For the purposes of this study, towns and smaller cities were defined as those centres ranked 51-250 by Experian in 2002, which, at the time of the research, was the last time this data had been collated.

The approach adopted for this research was as follows:

• A literature review to establish the context influencing retail-led regeneration in towns and smaller cities.

• A national survey based on questionnaires sent to all Local Authorities representing the centres ranked 51-250, and to all members of BCSC (British Council of Shopping Centres). A representative 30% response rate was achieved.

• Tracking retail-led developments in the industry and professional press in the centres ranked 51-250 reported during, and for a year prior to the start of, the research.

• Five detailed case studies selected to illustrate the key issues highlighted in responses to the questionnaires. This involved a series of in-depth face-to-face interviews to investigate particular issues. Shorter interviews were also undertaken with a range of other local authorities and key actors that demonstrated interesting practice.

• Synthesis of the findings and production of this report.

Town Centres ranked 51-250 Experian 2002

Aldershot*
Altrincham
Andover*
Ashford (Kent)
Ashton-under-Lyne
Aylesbury
Ayr
Ballymena
Banbury
Bangor (Wales)*
Barnsley
Barnstable
Barrow-in-Furness
Basingstoke
Basildon*
Bedford*
Belfast
Bexleyheath*
Birkenhead
Bishop Auckland*
Bishops Stortford
Blackburn
Blackpool
Bognor Regis
Bolton*
Bootle
Bournemouth
Bracknell*
Bradford*
Braehead
Brent Cross
Brentwood
Bridgend*
Bridgewater
Burnley
Burton-upon-Trent
Bury
Bury St Edmunds*
Camberley*
Canterbury*
Carlisle*
Carmarthen
Chatham
Chelmsford
Chelsea - Kings Road
Chesterfield
Chichester
Chippenham
Chorley
Cirencester*
Clydebank*
Colchester

Covent Garden
Coventry
Crewe*
Cwmbran
Darlington*
Dartford
Dewsbury
Doncaster*
Dover
Dumfries
Dundee*
Dunfermline
Durham*
Ealing Broadway
East Kilbride
Eastbourne
Eastleigh*
Enfield
Epsom
Falkirk*
Fareham*
Farnborough*
Glenrothes*
Gloucester*
Grafton Centre (Cambridge)*
Grantham
Great Yarmouth
Greenock
Grimsby - Victoria Street
Halifax*
Hamilton
Hammersmith*
Hanley*
Harlow
Harrogate
Harrow*
Hartlepool
Hastings*
Hemel Hempstead
Hereford*
High Wycombe
Horsham*
Hounslow*
Huddersfield
Ilford
Inverness
Irvine*
Keighley
Kendal
Kensington
Kettering
Kidderminster

Kilmarnock
Kings Heath
Kings Lynn
Kirkcaldy
Lancaster*
Leamington Spa
Lewisham
Lisburn
Livingston
Llandudno
Llanelli
Londonderry
Loughborough*
Lowestoft
Luton
Macclesfield*
Maidenhead
Maidstone
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Merthyr Tydfil
Neath
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Northampton
Northfield
Northwich
Nuneaton
Oldham
Paisley
Parkhead
Penzance
Perth
Pontypridd
Poole*
Portsmouth*
Preston
Putney
Redditch
Redhill
Rhyl
Richmond (London)
Rochdale*
Romford
Rotherham
Rugby*
Salisbury
Scarborough*
Scunthorpe*
Shrewsbury*

Skegness
Slough
Solihull*
South Shields
Southend-on-Sea
Southport
St Albans
St Helens*
Stafford
Staines
Stevenage
Stirling
Stockton-on-Tees*
Stratford
Stratford-upon-Avon
Sunderland
Sutton
Sutton Coldfield
Swansea
Swindon*
Tamworth
Taunton
Telford*
Torquay
Truro
Uxbridge
Wakefield
Walsall*
Walthamstow
Warrington*
Washington
Welwyn Garden City*
West Bromwich
Weston-super-Mare
Weymouth
White Rose
Widnes
Wigan
Wimbledon
Winchester
Windsor
Woking
Wood Green
Woolwich
Worthing
Wrexham
Yeovil

* Participated in survey

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