

High Street London

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SUMMARY, FINDINGS AND RECOMMENDATIONS

The potential of London's high streets

London's high streets capture the excitement, dynamism, endless variety and stark contrasts that characterise the city. They represent a distinctive element in the city's historic urban fabric that Londoners and visitors to the city continue to use and hugely value. Responsibility for their well-being transcends a wide range of strategic and local public sector remits: planning, transport, economic development, housing, street management, etc. In many respects they are the pulse of the city, their success or failure provides a direct indicator for the health of London as a whole.

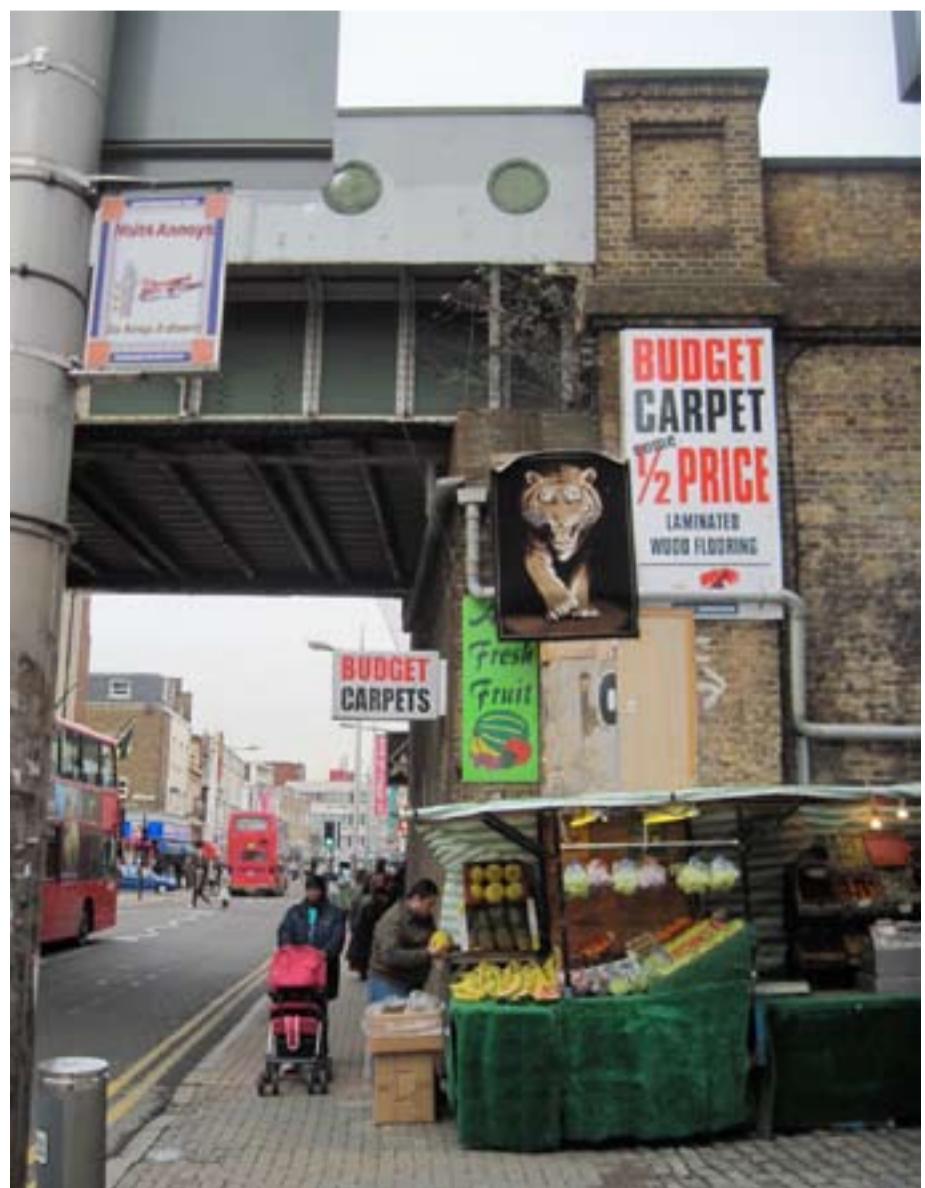
The research revealed:

- The great variety and complexity of London's high streets and the multiple endemic problems that many face
- Their continued value as physical, real estate, and movement spaces, and as places for economic and social exchange.
- Through targeted public and private investment, high streets could become the focus for London's future growth
- This potential is multiplied by the presence of existing infrastructure and already well-established communities; in-built advantages that many less connected brownfield sites do not possess.

The potential is huge:

- London's high streets currently support more employment than the Central Activities Zone, and deliver major quality of life benefits to Londoners
- Prioritising investment on London's 500km high street network could deliver growth and regeneration benefits to a vast area of London – 22% of the total area of Greater London is within 200m of a high street
- Half of London's brownfield land is on or within 200m of a high street.
- Prioritising investment on London's high streets could benefit a vast population transcending all sections of society – two thirds of Londoners (5 million) live within a five minute walk of a high street.

London's high streets account for just 3.6% of the road network, but represent some of the most important spaces in the city, with significant strategic growth potential and critical local significance. It is time they are given the attention they deserve.



London High Streets; Clockwise from top left, Wembley, Redbridge, Ealing, Peckham

The research project

In November 2010, Design for London commissioned the High Street London research project from UCL and Gort Scott as part of a wider series of projects which are attempting to address the potential of London's high streets. These include detailed studies of the A11 / A118 corridor to Stratford (High Street 2012), the A4020 corridor (Uxbridge Road Strategy) and work on the A10 / A1010 corridor. A hypothesis behind much of this work is that London's high streets continue to play a vital strategic and local role across the capital, representing a characteristic and important element in the city's urban fabric, with great potential to accommodate much of London's predicted future growth, new jobs, and housing.

Yet, as complex pieces of physical, social and economic fabric, the public sector has all too often seen high streets in planning terms as simply locations on an abstract retail hierarchy, in transport terms as traffic corridors, and in urban management terms, as a low priority. A serious look at London's high streets is well overdue. Using existing and original research, the High Streets Agenda project aimed to: *develop a better understanding and insight into the functioning of high streets, thereby identifying the role of high streets in supporting London's sustainable growth and development.*

At the core of the project are five research questions, which are used to structure the report:

- 1. What are high streets?**
- 2. What issues are high streets facing?**
- 3. What is the nature of London's high streets today?**
- 4. What is the potential of London's high streets?**
- 5. How is policy facilitating the potential?**

The report structure

The questions are used to structure Parts A and B of this final research report. Part A focuses on high streets as a generic type, drawing from existing research to determine the nature of high streets today and the issues they face. Part B looks at London's high streets specifically, and draws on extensive London-wide mapping and local case study analysis to understand how London's high streets are faring and at their potential future role within the Capital.

Intermediate conclusions are presented at the end of each chapter in Parts A and B, whilst overarching findings are brought together in this summary to directly address the five research questions and to make a number of key recommendations.

A note on research methods

A mixed methods approach was used to conduct the research, involving four key stages:

- Stage One, desktop literature and policy review: In order to establish a rigorous basis from which to undertake empirical analysis of London's high streets Stage One attempted to understand the range of issues identified in the literature and the means by which policy is seeking to address these.
- Stage Two, map-based historical and typological analysis: Stage Two used historical and contemporary GIS maps of London's street network as a means to understand the growth of London's high streets, the characteristic types of London high street, and the means to isolate high streets from other urban structures in order to facilitate their analysis.
- Stage Three, GIS-based mapping and review of existing high street data: To obtain a London-wide picture of the present role and future potential of London's high streets, Stage Three drew together and analysed London-wide data covering development potential, employment, transport accessibility, resident population, access to healthcare, and pollution (see Appendix 2).
- Stage Four, on-site case study analysis of six London high streets: Supplementing the London-wide analysis, this stage of the work involved the research team and teams of MSc students from UCL's Bartlett School of Planning working on six high streets across London. The stage analysed a range of high streets types, carefully chosen reflect the diversity of socio-economic, physical and geographical criteria that characterise London's high streets. The stage focussed on understanding their character and qualities and the nature of possible physical and management propositions that might address the issues identified in the literature and policy review. Separate but related work advising the London Borough of Redbridge on the potential of the A12 corridor also informed this stage of the project.

The research was analytical in nature, focused on understanding London's high streets outside of the Central Activities Zone which by its very nature is a special case of almost continuous mixed use streets. It was not within the scope of the project to develop a detailed set of policy or project propositions for the future of London's high streets. The work nevertheless provides an excellent basis for such a follow-on study through which detailed guidance on high street analysis and intervention could be prepared for stakeholders involved in the planning, design, development and management of these spaces on a daily basis.

Report Findings

01

What are high streets?

High streets are mixed use urban corridors. They are associated with town centres, but often go far beyond designated town centre locations, sometimes stretching for many miles along key routes through urban areas; as in London. The literature reveals that they are changing and under threat, but remain: highly connected, both physically and to different transport modes; adaptable, although also sensitive to change; hugely diversified in the mix of uses they offer (not just retail); and important social milieu for civic and community life. When healthy they provide an intensity of locally-based activity and enterprise that sets them apart from other urban structures.

refer to diagram right: five high street characteristics.

They are also highly varied in their character and robustness in the face of external threats, yet typically are crudely lumped together in policy as simply – and separately – retail and movement structures, rather than the integrated, complex and diverse urban places they are.

If the five characteristics identified above establish the key qualities of high streets, then to what do these characteristics apply? High streets can be conceptualised as at one and the same time:

1. **Physical fabric** - often historic in origin and sensitive to change
2. **Places of exchange** - of social, cultural, political and economic activity
3. **Movement corridors** - channels of communication through the city
4. **Real estate** - typically in multiple uses and fragmented ownerships

However, the complexity of high streets makes it a significant challenge to understand the needs, conflicts and potential synergies within, let alone between, each of these high street functions. Yet, arguably, the extent to which these are recognised and addressed in public policy and in day-to-day management practice will determine the character, day-to-day functioning and ongoing success (or otherwise) of high streets.

refer to diagram right: Analytical framework.

02

What issues are high streets facing?

The literature review revealed a diverse range of issues impacting on high streets across the four high street functions and the overarching issue of high street management. They can be summarised in terms of strengths, weaknesses, opportunities and threats.

Logically, to maximise the potential of high streets, strategies will need to be found that utilise the strengths, address the weaknesses, harness the opportunities and neutralise the threats.

It is important, however, to stress an overarching finding from the literature review that every high street is unique; a product of its own local set of strengths, weaknesses, opportunities and threats. As such, although the literature suggests a range of generic high street issues, these may or may not be pertinent to local circumstances.

refer to table overleaf.

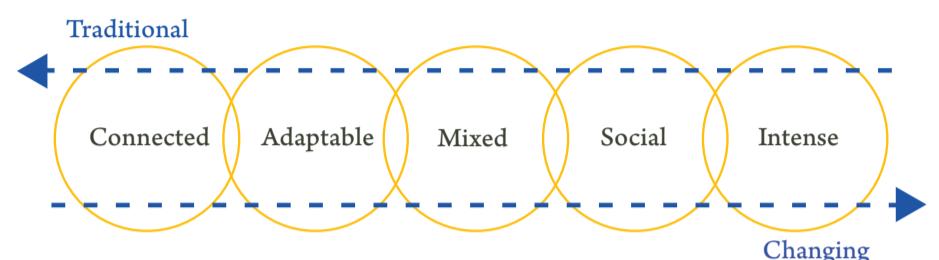


diagram: five high street characteristics

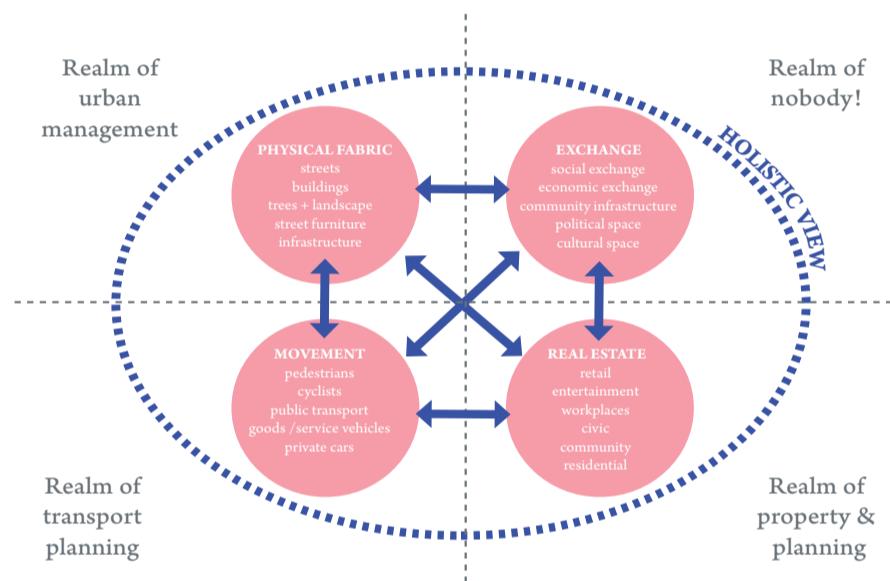


diagram: Analytical framework

Issues	Strengths	Weaknesses	Opportunities	Threats
Management	<ul style="list-style-type: none"> • Diversity of interests • Multi-disciplinary perspectives 	<ul style="list-style-type: none"> • Complex management environment • Fragmented governance • Ad hoc decisions • No holistic vision • No coherent user voice 	<ul style="list-style-type: none"> • Better coordination of responsibilities • Engaging with street-user groups • Active management through TCM or BIDs • Differentiation strategies 	<ul style="list-style-type: none"> • Failure to recognise their value • Failure to learn
Real Estate	<ul style="list-style-type: none"> • Huge sunk investments (public and private) • Diversity of investors • Genuine diverse mixed use 	<ul style="list-style-type: none"> • Decline in high street retail • Decline in independent retailers • Closure of key local services • Decline in civic amenities • Reduced multiplier effects • Increased costs – rent, rates, alterations 	<ul style="list-style-type: none"> • Reduced planning gain requirements • Invest in the catchment • Growth in the convenience market • Better small business advice • Efficient public sector investment vehicle 	<ul style="list-style-type: none"> • Danger of reaching a tipping point • Crude planning Competition from out of town retail • Vulnerability of chain stores
Physical	<ul style="list-style-type: none"> • Historic and distinctive fabric • Robust fabric • Adaptable to change 	<ul style="list-style-type: none"> • Poor public realm • Decline of heritage assets • Street furniture clutter • Poor cleanliness and maintenance • Cloning and loss of local identity • Poor lighting 	<ul style="list-style-type: none"> • Public realm investment raising economic value • Stated user willingness to pay for improvement • Reinforce distinct sense of place • Simplified streetscape schemes 	<ul style="list-style-type: none"> • Failure to reinvest • Continued poor management • Continued leaching of diversity
Exchange	<ul style="list-style-type: none"> • Natural social venues • Diverse range of user groups • Low actual crime • Diverse economic activity 	<ul style="list-style-type: none"> • Lack of responsibility for exchange functions • Poor understanding of user profile • Chain stores reducing local wealth recycling • Conflict with functional concerns • High perception of crime 	<ul style="list-style-type: none"> • New markets, events, social activities • Active management to reduce fear of crime 	<ul style="list-style-type: none"> • Eventual decline of community • Entrenched social exclusion
Movement	<ul style="list-style-type: none"> • Well connected • Natural movement corridors 	<ul style="list-style-type: none"> • Conflict for space • Culture of separation and traffic flow efficiency • High traffic load • Poor integration of public transport • High accident potential • Lack and cost of parking • Servicing restrictions • Inadequate cycle facilities 	<ul style="list-style-type: none"> • Traffic calming • Pedestrian oriented crossing points • Parking as a management tool • Bus pull-ins 	<ul style="list-style-type: none"> • Future growth in traffic • Dominance of buses • Failure to address pedestrian needs

Table: SWOT analysis: a holistic view

03

What is the nature of London's high streets today?

A strategic picture

High streets are complex phenomena and the London-wide picture is complex also. Mapping key data sources against high street locations revealed much about the strategic roles high streets continue to play across London, and about their future potential. Other sources reveal that many have declined and continue to suffer from disinvestment and poor management.

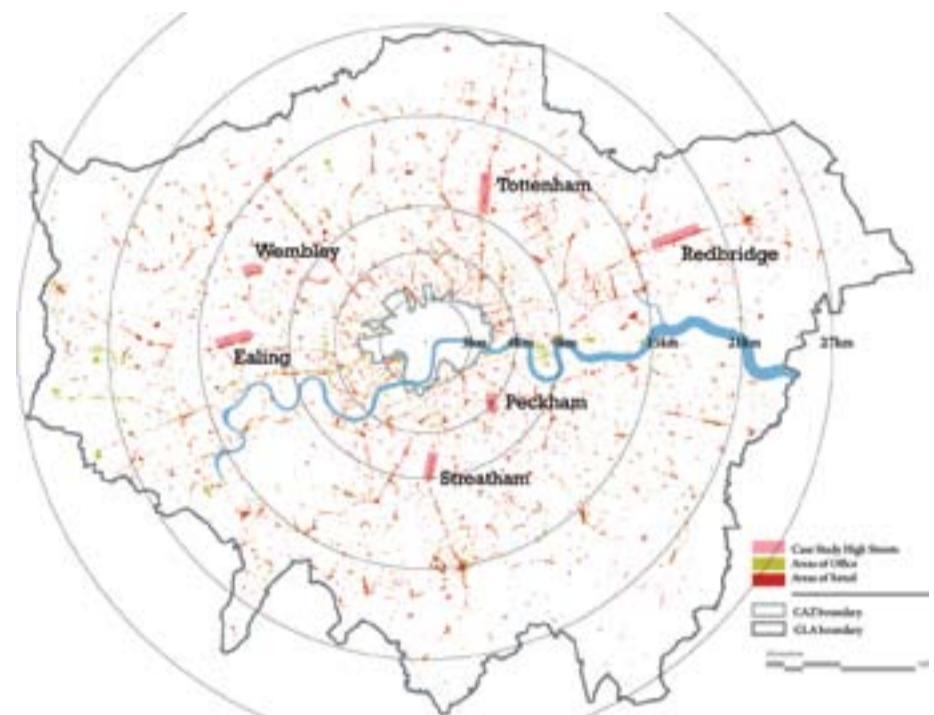
London's 500Km of high streets outside the Central Activities Zone grew variously from a combination of development along key historic routes out of the city, and from its pre-existing historic village centres. This history has respectively given rise to 'Connected' and 'Detached' types of high street, either as part of the major linear routes through and connecting up the city, or sitting independently from these as part of a local network. Today they represent just 3.6% of London's road network, with a significance that belies their limited extent.

London's high streets today

High streets fulfil a vital economic function in London as home to much of its huge retail economy. If, as predicted, the population of the city continues to grow, then so to will opportunities for many of these spaces over the long-term. However, without a strategic view that recognises the value of high streets or proactive public intervention, this growth will continue a consolidation of London's retail offer away from many high street locations; processes encouraged by the high costs of doing business on London's high streets, stemming, for example, from high rents and high servicing costs.

One-size-fits-all solutions across London high streets will not be appropriate, nor will purely physical interventions. Nevertheless, significant opportunities exist:

- **Development opportunities:** Three quarters of London's developable brownfield land and large Strategic Housing Land Availability Assessment (SHLAA) sites are on, or within 500 meters of its high streets.
- **Win / win benefits:** Within in excess of half of such sites within two and half minutes walk of a high street, giving such sites priority status will have the win / win knock-on benefits of making the high street more viable, whilst *inter alia*, a thriving high street will make neighbouring sites more attractive.
- **Boosting quality of life:** Perceptions of high streets are often different to the reality, for example crime is far lower on high streets than it is often perceived to be. Thriving high streets will deliver huge quality of life benefits to their existing substantial living and working populations.
- **Delivering employment opportunities:** London is a global city, but also a local one. On or within 200 metres of its high streets it has a higher number of employees (1.45 million) working in almost double the number of businesses found in the Central Activities Zone. High streets support and boost small scale entrepreneurial activity.
- **Benefiting all Londoners:** The health of high streets are important to all Londoners as the inescapable context for their everyday life, with two thirds (5 million) living within a five minute walk and 10% actually on or immediately next to a high street. They disproportionately benefit many vulnerable, economically disadvantaged and less mobile groups.



Map: locations of the six case-study high streets within this report



Map: London's high streets as identified within the parameters of this study

04

A local view:

What is the potential of London's high streets?

London's high streets reflect a wide range of types. Outside the Central Activities Zone (CAZ), the differences between morphologically 'Connected' and 'Detached' high streets is particularly significant, as is their distance and geographic position relative to Central London, and the strong associations this has with their socio-economic context. Choosing six detailed case studies on this basis and subjecting them to a range of detailed analysis revealed much information about the potential of London's high streets.

- **Supporting civic life:** Responsibility for the location of civic and community functions across the capital is fragmented and could be much better coordinated to stem the flight of such functions from the high street, and to support those still there. As a by-product, to support retail uses and the overall vitality of London's high streets.
- **Connecting up:** High streets vary considerably in terms of access to public transport. In about half of London's high streets great potential exists to improve public transport accessibility further, taking advantage of the sizable concentration of mixed uses that exist there and the potential to stimulate existing development potential.
- **Linear regeneration:** many of London's high streets cut across administrative boundaries and areas with different demographics and levels of deprivation. The city is therefore not simply a collection of nodal town centres and surrounding residential areas, but a continuous urban fabric, joined by linear mixed use corridors. Investment in high streets will bring potentially significant regeneration benefits to all sections of London society.

The key threat, and an opportunity

Despite the opportunities, many of London's high streets have been in long-term decline since the 1970s. As such it will certainly be necessary to look beyond retail to establish a viable future for some high streets, requiring public sector help in the process. On the negative side, London's high street network has become saturated by traffic with consequential high levels of pollution, many far in excess of UK objective levels. This represents a key threat both to the health of London's high streets and in a very real sense to their users and residents.

High streets nevertheless represent substantial sunk investments in fixed public and private assets that, if invested in, are likely to lead to sustainable knock on economic impacts which can be captured over the long-term in council tax and business rates increases. This implies that public investment in high streets will be a particularly effective use of resources, because new jobs and housing will benefit from and strengthen existing infrastructure, communities, public services, and private businesses, rather than having to be provided from scratch. Other research has demonstrated that users are supportive of such public investment and are willing to contribute to it through their council tax and public transport fares (see 3.7.2). But such interventions will need to transcend physical fabric, real estate, exchange, movement and management opportunities, and above all address the problems of traffic overload in many of these vitally important spaces.

The potential of a robust physical structure

The physical structure of high streets determines their likely patterns of use, with shorter and fatter detached high streets resembling traditional more homogenous town centres, whilst the longer and thinner connected streets are often made up of a series of connected parts, each of which is likely to be used in a different manner, by different groups of users, and should be managed with these patterns of use in mind.

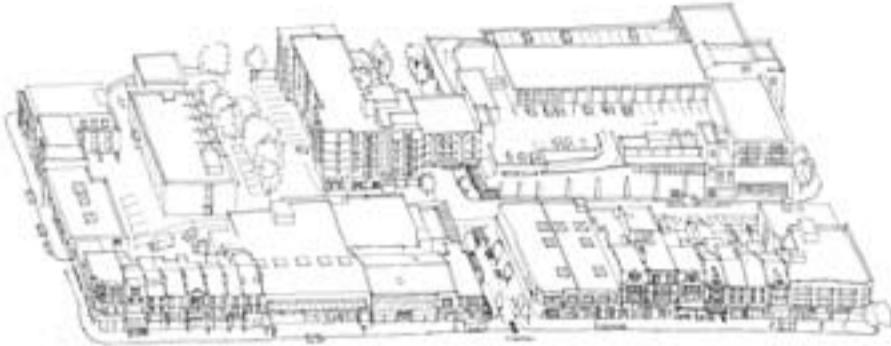
A characteristic of the urban blocks that front onto high streets is a huge diversity in their physical form and the land uses they host. Hidden behind the high street facades are a bewildering array of activities that feed off each other and the high streets, and which in turn help to fill it with life. Thus retail uses typically only account for 55% of the non-domestic uses in and around high streets. This diverse crust of activity is usually one block deep along high streets, and potentially very vulnerable to the threats that high streets face (see above). It should not be sanitised in a headlong rush to 'regenerate' or 'regulate' high streets, but should be nurtured as a source of employment and great vitality that goes some way to explain the impressive employment figures associated with London's high streets.

At the same time, the integrity of the high street building line should be respected, with new development required to respect or repair this as a basic urbanistic parameter. This structure allows for both continuity (on to the high street) and change (within the block), and therefore for great adaptability over time. It is far more important than the architectural quality of the buildings, whilst rationalisation of the public realm can be used effectively to enhance overall visual quality, and freedom of movement.

The potential of distinctive and dynamic mixed real estate profiles

Retail is clearly critical as part of the high street mix, and London high streets often possess their own particular mix of retailers, providing very distinctive characters in the process. The analysis suggested that outside of the major town centre locations such as Ealing where high rates and rents seem to restrict the offer to the national chains, high streets have been highly sensitive to the different local communities they serve. In particular they support a range of small businesses (averaging 8.5 employees across the sample) with the knock-on competitiveness, innovation, local economic development and sustainability benefits this implies. Across the case studies independent retailers had increased in number by 20% since 1971, whilst the absence of chains in less prosperous areas, has allowed new independent retailers to spring up to serve the new tastes of their now culturally rich communities.

The case studies were replete with development opportunities, including the re-use of underutilised buildings (large and small), development on underutilised and vacant land that often fell within the hinterland of the high streets, and development through the intensification of existing uses. Unfortunately, many of the larger opportunities were not straightforward, requiring public sector initiative, powers and resources to bring them to the market.



Drawing: sketch of mixed-use block

A	B	C	D	E	F	G	H
							<img alt="Icon representing

Towards a more positive and integrated delivery agenda

High streets may be one of London's great unrealised opportunities. Therefore, rather than placing these complex entities in the 'too difficult to handle category', they could be made a strategic priority for public sector policy, investment and action over the next ten years, in the process benefitting both their existing communities of users, and the new ones yet to come.

Such an approach will need to begin with a different type of policy, one that is not just aspirational and analytical, but is visionary, and derives from a sense of what London's numerous and hugely varied high streets have to offer: what makes them special; what their unique selling points are; and what their place might be, not in a mythical retail hierarchy, but instead as vital, complex and immensely important assets of their local communities, with so much more to offer than just shopping.

It will also require a very different approach to their management both to stimulating their growth potential over the long-term, and to their day to day stewardship. It will require intervention that sees high streets not as a set of fragmented responsibilities, but instead in a holistic manner, where imperatives of exchange and movement are reconciled within the physical fabric in a manner that maintains a viable real estate market. In London, key delivery partners will include the range of GLA functional bodies who will need to align their planning / growth (GLA), transport (TfL) and economic development (LDA) functions more strongly in order to exploit the unrealised potential of high streets; the Boroughs; and the range of sub-regional and local partnerships.

Physical fabric	Retail	Exchange	Movement	Management
Distinctiveness initiatives <ul style="list-style-type: none"> Conserve and reveal valuable heritage where possible Provide loans to upgrade shopfronts on the basis of adopted design guidance Enhance character through public art, landscaping and opportunities for new landmark buildings Encourage un-blocking of shopfronts to create display space and active frontages Consider the parts and the whole, and whether the parts have their own distinctive characters and/or role. 	Vacant properties initiatives <ul style="list-style-type: none"> Actively encourage temporary uses in vacant buildings Compulsory purchase derelict buildings and land and support site assembly Introduce living over the shop grant and advice regime Intensification and redevelopment <ul style="list-style-type: none"> Grow high street catchment by prioritising sensitive new development along and around high streets Actively compile sites to facilitate redevelopment Encourage re-use of large sites for temporary purposes e.g. markets, events, exhibitions, etc. Retail diversity <ul style="list-style-type: none"> Protect diversity through local 'well-being' powers (e.g. purchasing threatened local businesses) and planning policy Encourage street markets and mini-markets Introduce advise service for small businesses Big box initiatives <ul style="list-style-type: none"> Redress relationship to the street, through major redevelopment or wrapping schemes Only allow new big box developments if sensitively integrated behind a high street facade 	Green and civic spaces <ul style="list-style-type: none"> Upgrade quality of neighbouring green spaces and remove barriers to integration with high streets Consider opportunities for new incidental / civic spaces and pocket parks, e.g. reclaiming road space at junctions / side streets Encourage shops, cafes and restaurants to spill out onto street space Crime initiatives <ul style="list-style-type: none"> Dedicated street wardens to reduce anxiety Encourage Trader watch schemes Encourage family-based evening economy uses Civic uses <ul style="list-style-type: none"> Resist pressures to consolidate and relocate civic-type functions to off-high street locations Consider opportunities for new high street based civic uses e.g. libraries, idea stores, citizen advice, housing / payment office, leisure facilities, etc. Public toilets <ul style="list-style-type: none"> Better manage existing facilities Open new high quality, accessible public toilets 	Traffic calming <ul style="list-style-type: none"> If possible divert through traffic to bypass roads Where possible make high streets 20mph zones Where appropriate adopt naked streets principles, to encourage changed perception of road / pedestrian balance Lane reduction where possible to allow space for service bays and short-term parking Introduce super-crossings, allowing diagonal crossing at junctions Improved pedestrian experience <ul style="list-style-type: none"> Adopt shared space principles where possible off the main high road run Widen pavements where congested Remove street clutter and barriers to allow pedestrians to move more freely Improve way-finding e.g. adopting legible signage Where poor, enhance connectivity between the high street and its hinterland Public transport improvements <ul style="list-style-type: none"> Upgrade bus shelters Relocate stops to avoid pedestrian / bus congestion Allow space for bus pull-ins Enhance interchange spaces and routes between high streets and stations Cycle network improvements <ul style="list-style-type: none"> Link up cycle network to stations Introduce continuous cycle routes along high streets Upgrade cycle parking Pollution <ul style="list-style-type: none"> Treat road surfaces to reduce particulates Carefully control new higher building proposals to avoid canyon-type effects Reduce traffic loads and speeds 	Community engagement <ul style="list-style-type: none"> Facilitate community consultation and research to properly understand different communities and users and their long-term needs Consider community based art and other engagement initiatives Day to day management <ul style="list-style-type: none"> Introduce town centre management to better coordinate management roles and responsibilities Encourage BIDs schemes to raise additional resources for management Invest in long-term maintenance Better control and coordinate waste disposal and removal Prioritise everyday cleaning, cleansing and maintenance Consider better marketing, for example through a dedicated website, events and activities Encourage shop owners or residents to adopt benches, flower beds, etc.
Public realm <ul style="list-style-type: none"> Distinguish high street through road surface colour and texture Adopt consistent, simple and high quality public realm treatments: paving and street furniture 				
Trees and soft landscape <ul style="list-style-type: none"> Protect street trees and introduce or replace where required to soften the landscape and filter dust Introduce seasonal colour through planting 				
Lighting strategy <ul style="list-style-type: none"> Replace roads-based lighting with pedestrian focused lighting schemes Floodlighting of landmark buildings and creative lighting to enhance evening economy • fabric: 				

Ten recommendations for action

In London, key delivery partners will include the range of GLA functional bodies who will need to align their planning / growth (GLA), transport (TfL) and economic development (LDA) functions more strongly; the London Boroughs; and the range of sub-regional and local partnerships active across the city. Ten key recommendations can be made for immediate consideration by these organisations:

1. Celebrate London's high streets: find means to celebrate London's high streets, to put them more firmly on the public and policy agenda, by recognising their huge local and strategic contribution across the city
2. Take a strategic view: recognise in the Mayor's future economic development, transport and planning strategies the importance of mixed use high street corridors as London-wide strategic structuring devices, with vital and overlapping physical, real estate, movement and economic and social exchange functions.
3. Re-focus public investment: re-focus economic development resources to support economic development and housing growth onto sites along or close to London's high street corridors and away from isolated brownfield locations
4. Prioritise high streets: prioritise public realm improvements onto the 3.6% of its road network that function as mixed use high street corridors
5. Adopt local high street policies: recognise in Borough planning policy the importance of high streets as varied, complex and unique places, and not just as retail or necessarily town centre spaces
6. Refocus civic uses onto high streets: question all decisions to locate or re-locate civic / community functions away from high street locations
7. Address the fragmentation of responsibilities: consider how to better coordinate public sector investment, management and regulatory functions to better deliver integrated physical fabric, real estate, exchange and movement benefits
8. Address the traffic / pollution problem: urgently investigate pollution attenuation measures, and means of reducing the impact of traffic on London's high streets
9. Build local coalitions of interests: examine ways of better engaging with high street users (community and business) to encourage local partnerships that can more proactively shape the future of their local high streets
10. Provide a toolkit for change: develop tools for use by London's Boroughs and local partnerships to allow a better understanding of individual high street character, qualities and opportunities, and where appropriate, the translation of this knowledge into positive strategies for change.

PART A:

UNDERSTANDING HIGH STREETS

01 What are High Streets?

1.1 The generic high street

1.1.1 Traditional but changing

Griffiths et al (2008: 1155) argue that the typical high street is a complex and dynamic socio-spatial entity that is increasingly facing particular challenges to its vitality and viability in the light of ongoing economic and cultural change within society. For them:

"the term 'high street' carries cultural connotations of reassuringly small town or suburban neighbourhoods characterised by social stability and enduring local identity. According to the popular image, the high street functions as the commercial hub; a place where near neighbours 'bump' into each other on their way to the post office, parents accompany children to the library and the elderly swap local gossip at the bus stop. Above all, the idea of the high street is associated with the presence of a wide variety of small local shops, ensuring easy pedestrian accessibility to everyday goods and services".

This somewhat idyllic image seen in historic photos of high street life has increasingly been challenged by the rise of out of town and (more recently) internet shopping, the demise of many independent retailers, the rise in car ownership and the increasingly dominant role of high streets as movement corridors, and by changing life styles that have shifted patterns of movement and exchange (both social and economic) from a local to a larger scale (see Section 2).

A useful analysis of the contemporary high street is provided by Dawson (1988: 1-7). He argues that high streets are essentially nineteenth century constructs, born out of the industrial age when retailing developed rapidly in order to deliver the new industrial society to its consumers. By contrast, in the twentieth century, retailing in the UK has had to increasingly deliver to a post-industrial society, and has needed to adapt considerably in order to do so. This, he suggests, has led to structural changes to the nature of high streets:

1. The development of a core and frame to most high streets, often starkly defined, where the frame is far more marginal than the core and exhibits many largely un-modernised properties, frequently in independent ownership and use.
2. High streets have diversified in the services they offer: personal consumer services (hairdressers, gyms, etc.); financial services (insurance, mortgage advice, etc.); household services (estate agents, design and maintenance, etc.); leisure services (restaurants / cafes, video hire, etc.); medical health services (opticians, specialist and alternative clinics, etc.); business services (employment agencies, internet, printing, etc.); and government services (citizens advice, job centres, etc.).
3. Huge rises in the cost of retail floorspace, significantly above rises in other real estate sectors
4. A change in perceptions of high streets which are no longer always seen as the obvious and natural centre of communities, as spaces towards which people gravitate.
5. With increases in personal mobility and general accessibility across large urban areas, matched with increases in disposable income, urban populations have far greater choice over where and when they shop. As a consequence the old retailing hierarchies have been changing and breaking down.

The sum total of the changes means that high streets and high street occupiers now have to work harder for customer loyalty and can no longer take a fixed customer base for granted.



The idyllic high street



An alternative to high streets

High Street Etymology

High street, highway, main road; main street of a town. OE. *hēahstrēt* often used of the Roman roads (www.encyclopedia.com)

In Old English, the word "high" meant something excellent of its type or of elevated rank. From the ninth century it was applied to roads eg. Highway, which was normally an essential communications link between two towns, that was under special protection of the monarch.

Shortly afterwards, around the year 1000, high street started to be used to describe a significant thoroughfare either in the town or country. The word street tended to refer to a road that was paved. As medieval towns emerged alongside these main routes, they provided services for passing trade and over time High Street came to refer to urban roads containing shops and services. (www.worldwidewords.org)

1.1.2 Connected

Physically, Griffiths et al (2008: 1159) argue that British high streets can frequently be characterised as 'unplanned central places', typified by their dual roles as attractors of activity – commercial, community and otherwise – and as 'routes' for through movement. For Hillier (1999), even if unplanned, the location of high streets is not a chance affair, instead high streets occur at those points in the movement network where movement is optimised; at the best connected places on the grid. At these localities, because the movement economy is maximised (Hillier 1996), so are the opportunities for certain land uses that then quite naturally locate in these places. He argues that certain 'live' uses (retail, markets, catering and entertainment) are particularly sensitive to such processes, explaining the sensitivity of such uses to factors that undermine centrality, and their importance when discussing the nature and health of high streets (Hillier 1999: 06.1).

Once located, these uses may subsequently act as multipliers on the basic patterns of natural movement, further adding to the attraction of certain localities (Hiller et al 1993). Following this logic, such uses usually spread in a linear fashion along high streets (taking advantage of their optimum centrality), and only begin to spread sideways into the neighbouring grid if the size of the settlement and the high connectivity of the locality allows. The analysis underlines the critical importance of preserving the movement economy by, for example, avoiding the severance effect of unrestrained traffic growth along high streets, but also the sensitivity of 'live' uses off the most integrated line, and that these will be the first to suffer if the health of the high street declines.

1.1.3 Adaptable

Griffiths et al (2008: 1162) identify one of the critical characteristics of high streets to be their ability to adapt to change. For them, adaptability is well observed in the history of high streets, and today is increasingly seen as a necessary condition for sustainability. But this adaptability is predicated on a view of high streets that recognises them as diverse spaces, in which the retail function is just one, albeit the most prominent, of the range of socio-economic functions they house (see 4.4.3). Yet this diversity is rarely reflected in town centre literature or policy that inevitably focuses on retail at the expense of other activities (see 5.0).

High streets are adaptable, diverse spaces, in which the retail function is just one of the range of socio-economic functions they house. Yet town centre literature or policy inevitably focuses on retail at the expense of other activities

They argue this emphasis on retail is partly explained by the ready availability of retail data, which provides an intuitive basis for assessing urban scale and policy needs through relative position on the retail hierarchy; although not necessarily local needs or the potential of one high street over another in non-retail sectors. Thus a retail-centric view "threatens to create a vicious circle in which the economic vulnerability of smaller centres is continually reinforced by their relative invisibility in policy and investment terms" (Griffiths et al 2008: 1164). This represents a particular danger for many smaller or local high streets, whilst the challenge may be to identify opportunities for employment and community activities that may in turn benefit from the synergies offered by high streets. For Griffiths et al (2008: 1166), in the future these opportunities may come in the provision of office space for small-scale local businesses, and of facilities to cater for the growing body of home and

1.1.4 Mixed

For many the local high street still represents the quintessential heart of community, serving important roles as places of social contact and interaction for diverse segments of the society; particularly for those who are less mobile and for whom local shopping plays a vital role as a regular (and sometimes their only) source of social contact (ODPM 2005). One of the most comprehensive studies of high streets attempted to assess their contribution to sustainable communities through a review of three local high streets, including one in London. The researchers (Jones et al 2007a) demonstrated that mixed use high streets:

- Serve the diverse needs of mixed local populations of all ages and ethnic origins through the rich diversity of shops and businesses they support
- Are sustainable, most residents walked or used public transport to get to their local high streets, and did not drive
- Are the venues for a wide range of informal activities, making them important parts of the public realm
- Are used intensively both for pedestrians and traffic, and whilst this can give them a 'buzz' it also leads to serious conflicts at busy times
- Are valued by residents who generally exhibited a high level of satisfaction with the facilities they offer, and enjoy their street life
- Suffer from management neglect, including the dominance of heavy traffic, poor maintenance, and a lack of greenery, seating and public toilets
- Have a key role to play in enhancing local livability, social cohesion and in encouraging sustainable lifestyles.

For Jones et al (2007b: 27-41), a number of critical functions set high streets apart. First, their role as key components in the strategic network, stemming from origins (typically) on the routes that join settlements, where high levels of passing trade would augment the local custom provided by the residents of an area. Second, such streets are often, today, transport interchanges, accommodating movement between different modes of transport; in London including tube and rail, as well as bus and walking. Third, they act as pseudo-estuaries to channel movement from the surrounding catchment of, typically, residential streets. Fourth, they are typified by a rich mix of uses, including retail, service uses, and residential and office uses above the ground floor. Fifth, as locations for a wide range of on-street facilities and services, from the infrastructure under the street, to that on top (kiosks, cash points, telephone boxes, public art, parking, benches, bins, signage, CCTV, street lighting, etc.). Sixth, they are identifiable public spaces (positively defined by continuous street walls and active front) for social encounter and interchange. Finally, they act as centres of local identity, often peppered with landmark features as determined by their high profile uses or distinctive / historic appearance.

1.1.5 Social

Broadly these functions divide into two categories, those (the first three) associated with the function of high streets as a route connecting up places within the wider urban matrix, and those (the remainder) associated with the function of high streets as social places for the full range of civic and community life. Jones et al (2007c) have conceptualised these two essential functions of all streets in a 'link' and 'place' framework that allows decisions about the planning, design and management of streets to be made in a more balanced way through the creation of Street Plans that through explicitly recognising these two potentially conflicting functions of streets, attempt to resolve the tensions in a more considered manner (Marshall et al 2008).

They conclude that whereas a motorway may have a high link and a low place status, and a local residential street a low link and a lower place status (at least as far as it is not a major destination), a high street will typically sit somewhere in between, having to balance significant traffic loads with a status as a key destination in its own right (Jones et al 2007c: 45). Importantly, they also point out that not all traffic related activity can be solely attributed to the link function of a high street, as its place role also requires good accessibility for traffic, for loading and unloading, parking and public transport, and for pedestrians strolling through.

1.1.6 Intense

The All-Party Parliamentary Small Shops Group (APPSSG 2006: 6) identify another critical role of high streets, as "a key driver of entrepreneurship, employment, skills, local economies, innovation, and sophisticated business networks"; creating businesses that are generally small, lean and able to adapt (up to a point) to changing local circumstances. The low barriers to entry into retailing especially provide an opportunity for flexible employment and self-employment, making the small shops sector particularly attractive to migrants to the UK and to women. Retail is then often a stepping stone for entrepreneurs to start-up other businesses in other sectors in the locality (APPSSG 2006: 12). This, however, requires the clustering together of shops and other businesses in order to attract footfall to the location and establish the multiplier effects that no one business can achieve on its own. It also ensures a recycling of resources in the local economy as small businesses will tend to purchase local supplies, employ local staff, and their owners will often spend their profits in the locality (Friends of the Earth 2005).

For the high street to survive, therefore, a level of intensity is required that can support its uses, and once such a critical mass no longer exists, a spiral of decline can quickly set in (APPSSG 2006: 12-14). Where this happens, as well as the very obvious physical decline that follows, less obvious social impacts can be felt. The absence of shops selling fresh and affordable food, for example, can create 'food deserts' where shops only offer the most basic range of convenience foods. Typically these impacts are felt in less affluent neighbourhoods and amongst less mobile populations (e.g. the elderly or those with young children) who as a result can quickly suffer health problems resulting from poor diet, and over-reliance on the fast food establishments that quickly move in to fill the void. The All-Party Parliamentary Small Shops Group (2006: 15) suggest that in time, the decline of the high street can introduce significant costs into the economy, not least as a contribution to the current obesity epidemic. For them, therefore, the high street has a further critical social role in helping to overcome deprivation and health inequalities.

1.2 Conclusion, a framework for understanding high streets

1.2.1 High streets are ...

The literature reveals that high streets are changing and under threat, but can be distinguished as urban structures that are: highly connected, both physically and to different transport modes; adaptable, although also sensitive, to change; hugely diversified in the mix of uses they offer (not just retail); important social milieu for civic and community life; and, when healthy, provide an intensity of locally-based activity and enterprise that sets them apart from other urban structures.

They are also highly varied in their character and robustness in the face of external threats, yet typically are crudely lumped together in policy as simply – and separately – retail and movement structures, rather than the integrated, complex and diverse urban places they are.

see diagram right: high streets characteristics

1.2.2 An analytical framework

The Institute of Civil Engineers (2002: 9) argue that streets per se are incredibly complex urban structures, catering for a wide range of direct demands (things people want to do – play, exercise, socialise, move through etc.) and derived demands (things people need to have – sewerage, deliveries, emergency access, refuse collection, etc.). Adding to the complexity, high streets are perhaps the most complex of street types, with responsibility for their management widely dispersed amongst a complex web of public and private stakeholders.

If the five characteristics identified in 1.21 (above) establish the key qualities of high streets, then to what do these characteristics apply? High streets can be conceptualised as at one and the same time:

1. Physical fabric -

often historic in origin and sensitive to change

2. Places of exchange -

of social, cultural, political and economic activity

3. Movement corridors

channels of communication through the city

4. Real estate

typically in multiple uses and fragmented ownerships

see diagram left: analytical framework

However, the complexity of high streets makes it a significant challenge to understand the needs, conflicts and potential synergies within, let alone between, each of these high street functions. Yet, arguably, the extent to which these are recognised and addressed in public policy and in day-to-day management practice will determine the character, day-to-day functioning and ongoing success (or otherwise) of high streets.

It is therefore hypothesised that the real challenge is to see high streets in a holistic manner, where imperatives of exchange and movement are reconciled within the physical fabric in a manner that maintains a viable real estate market.

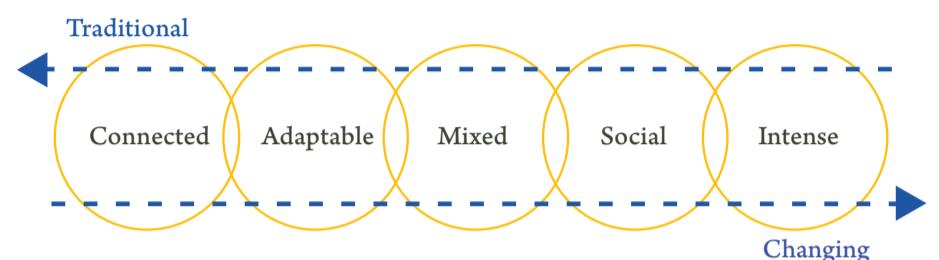


Diagram: Five high street characteristics

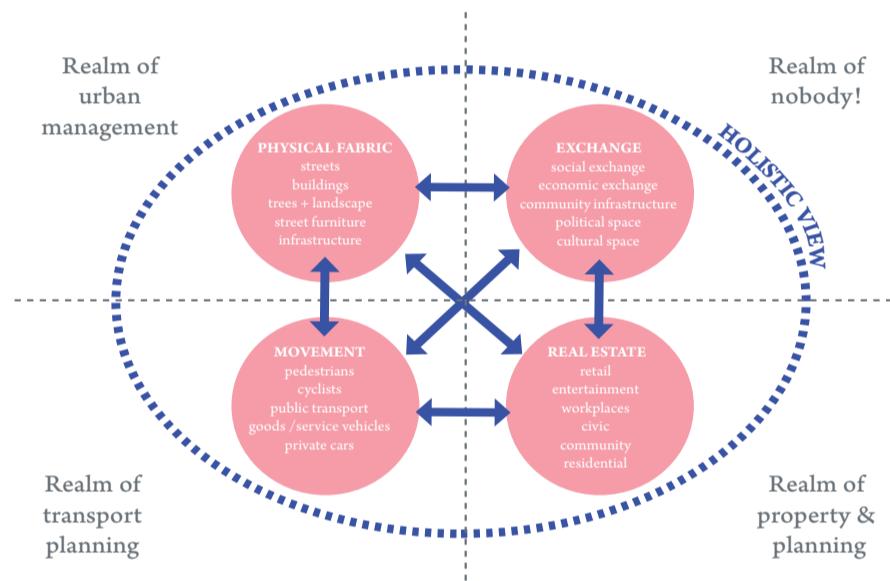


Diagram: Analytical Framework

02 What issues are High Streets facing?

2.1 Physical fabric issues

2.1.1 Poor design

Over the years, the duplication of responsibilities and lack of coordination in high streets (see section 2.5) has led to a situation where the public realm of many high streets is poorly designed and managed, with a multiplicity of signs, barriers and lights competing for space with other public realm furniture and features – telephone and letter boxes, benches, bins, floral displays, cycle racks, lighting columns, utilities boxes, street trees, etc. High streets are particularly susceptible to this problem because of the intensity of their use by multiple overlapping and often conflicting functions.

Until their demise to make way for CABE, the Royal Fine Art Commission had been active in issuing guidance aimed at improving design in the high street, including an influential 1986 report that advocated town centre management (RFAC 1986), and a later report from Colin Davis (1997) that argued the way to maintain high street viability in the face of out of town competition was to compete on the basis of their distinct sense of place. He argued that traditional high streets can succeed if they play to their strengths, but that this requires careful analysis and a programme of coordinated actions to identify what these are and how they might be exploited. Moreover, many of these are not about one off dramatic interventions or major redevelopments, but instead concern modest and practical actions aimed at improving the streetscape and enhancing distinctiveness: improving car parking, better way finding, clearing graffiti, rubbish and signs of decay, improving landscape quality, improving shop fronts, planting trees, creating incidental urban spaces, introducing seasonal colour, encouraging markets, events and social activities, accentuating landmarks, improving street lighting, investing in public art, calming traffic, and reducing street clutter.

The Transport Research Laboratory (2006: ii) focus on the last of these – street clutter – arguing that the problem is caused by the standard ‘segregate and control’ approach that is normally included in municipal road safety design guidelines, and which has been dominant in London:

“Typically safety practitioners have been concerned with reducing driver uncertainty and choice by providing them with timely guidance (via traffic signs and road markings) and by attempting to segregate different road users by the use of signalled pedestrian crossings, cycle lanes and barriers. This process, together with the growth of other visual intrusions such as street furniture and road side advertisements, can lead to a very visually cluttered road environment”.

Reflecting recent concerns that such approaches have been leading to a rapid deterioration in the visual quality of streets, particularly multi-purpose mixed-use streets, whilst failing to deliver the sought after safety benefits (DoT 2009), more innovative roads designs have been attempting to deliver simplified street scape schemes. These vary from simple removal of unnecessary signs and street furniture to reduce complexity and driver confusion, to removal of all markings and signage to deliberately increase driver uncertainty and encourage slower driving, to the establishment of shared space schemes where pedestrians and drivers share the same space and drivers effectively relinquish priority.

Only a relatively small number of schemes have been implemented, the most high profile of which has been the re-design of Kensington High Street. This scheme removed a wide range of unnecessary signs, railings and street furniture and combined this with the wholesale re-design of the street environment, including new crossings, changed road alignments, cycle parking, footway widening and re-paving, and new street trees. The scheme has delivered significant improvements to the quality and usability of the street for pedestrians and cyclists with, respectively, a seven and 30% increase in users. It has also reduced accident levels, suggesting that the example may be an exemplar for other high streets to follow (Transport Research Laboratory 2006: 21-23).

Through their work examining the potential of simplified streetscape schemes, the Transport Research Laboratory (2006: 51) identify four key pre-requisites for success:

- The design of the scheme must be done in a holistic manner and should be place-specific. Simply removing all signs will not have the required impact
- Traffic speeds should be kept as low as possible, with physical layout changes implemented to reduce speeds, although shared surfaces should only be introduced for traffic flows of 90 vehicles per hour, or less.
- Contrasting textures can be used to denote specific areas for different users, with allowances made (e.g. a clear safe route) for the visually impaired
- Careful consideration is required as to how the scheme will perform at night when street lighting will transform the way the street is perceived.

For their part, the British Retail Consortium (2009: 13) confirm that developing and managing an attractive trading environment is critical to maintain the competitiveness of local high streets, something that requires sustained investment in the public realm.



High street clutter



Kensington High Street

2.1.2 Loss of local character and distinctive uses

Griffiths et al (2008: 1171) argue that the recent changes to the high street are nothing new, and the battle between local independents and big business can be traced back at least as far as the spread of department stores in the 19th Century. Despite this, high streets have been able to adapt and survive. Thus the recent spread of charity shops and pound shops may simply be the next stage in that evolution; in economically difficult times, filling a clear gap in the market. They conclude that the full socio-economic importance of high streets should never be indexed by their retail functions alone:

"The high street acts as a centre of consumer, commercial and communal life, a place of work and a place of leisure, as a place and as a link between places. It is the synergies between these diverse social and functional characteristics that provide the mixed-use street with the potential to adapt to social change. The future vitality and viability of the high street cannot be minutely planned for because the exact form these might take can hardly be predicted" (Griffiths et al 2008: 1172).

Indeed diversity is perhaps the defining feature of healthy high streets, diversity in uses, users and physical character.

Support for a more positive view of high street potential is found in evidence taken by the All-Party Parliamentary Small Shops Group (2006: 24) which reveals that the convenience store market continues to grow by 5% annually reflecting the move away from bulk shopping and back to the high street to serve the changing habits of time poor, cash rich consumers. However, rather than long-established or independent convenience stores reaping the benefits of these trends, it seems that the large multi-nationals are becoming increasingly adept at exploiting the market. Thus in 2006, and despite only being in the local convenience market for ten years, Tesco had almost overtaken the then market leader (the Spar franchise network) with 5.4% of the market. Disturbingly, on top of their huge economies of scale and strong brand awareness, the All-Party Parliamentary Small Shops Group (2006: 25-27) uncovered a range of anti-competitive practices (e.g. below-cost selling to gain market share), that the national and multi-national chains indulge in to drive out local competition, supporting the 'cloning' of even very local high streets.

The notion of cloned high streets and the loss of identity and local character that goes with it represented the central charge of the New Economics Foundation (2004: 2). In a highly polemical and challenging style, they argue:

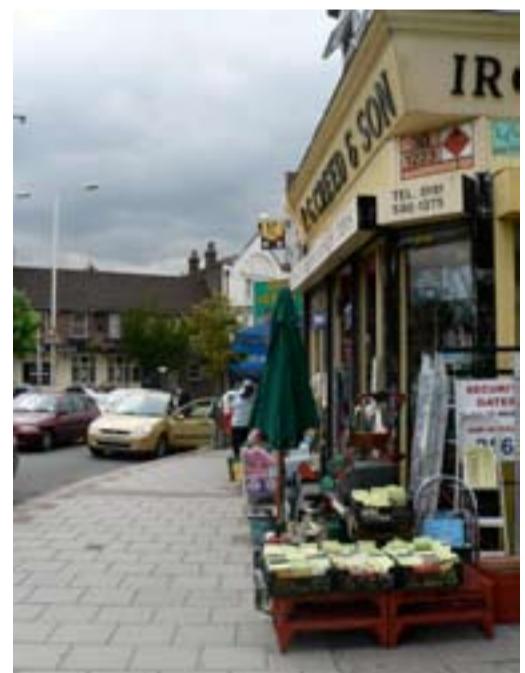
"In place of real local shops has come a near-identical package of chain stores replicating the nation's high streets. ... Many town centres that have undergone substantial regeneration even lost the distinctive facades of their high streets, as local building materials have been swapped in favour of identical glass, steel and concrete storefronts that provide the ideal degree of sterility to house a string of big, clone town retailers".

They quote Nick Foulkes (in New Economics Foundation 2004: 2) who writing in the London Evening Standard observed:

"The homogenisation of our high streets is a crime against our culture. The smart ones get the international clones – Ralph Lauren, DKNY, Starbucks and Gap; while those lower down the socio-economic hierarchy end up with Nando's, McDonalds, Blockbuster and Ladbrokes".

For these commentators, thoughtless planning and regeneration policies are in large part to blame for the loss of character in Britain's high streets. Moreover, they argue, the spread of chain retailers makes the high street less resilient to collapse during economic downturns, imperilling local livelihoods, communities and culture in the process and actually reducing choice. This latter point would seem to be supported by the collapse during the current recession of a number of high street chains (Woolworths, Wittard,

Borders, Zavvi, Adams, Barratt Shoes, and Threshers), and the impact this has had on some local high streets (at least in the short-term). The New Economics Foundation (2004: 16) argues, even when high streets seem to be thriving, this often means that they are supporting multi-national firms whose profits will be removed from the locality rather than circulating in and benefiting the local economy. Significantly, the British Retail Consortium (2009: 10) confirms the importance of a diverse and complementary retail offer as an important part in building a unique sense of place. This, they argue, should include a mix of familiar and popular brands with independent and niche stores.



Ironmonger store Seven Kings, Redbridge.



McDonalds, Goodmayes, Redbridge.

2.2 Real estate issues

2.2.1 Disinvestment

The impact of out of town development and the seemingly relentless spread of ubiquitous high street chains have been discussed extensively, most evocatively in the polemics of the New Economic Foundation (2003; 2004): Ghost Town Britain and Clone Town Britain. More recent evidence cited by the British Retail Consortium (2009: 7) shows a relentless decline in retail sales since the summer of 2007, with many of the types of goods found on the high street suffering worst. Many estimates have been made about the speed that key local services such as post offices, pubs, banks and independent food shops have been disappearing from the high street, most notably from the All-Party Parliamentary Small Shops Group (2006) which estimated that almost a third of Britain's post offices and a quarter of its high street banks had disappeared in the last twenty years. The result is that many high streets are now devoid from even the most basic financial and retail services.

For the New Economics Foundation (2003) the knock-on impact of these trends are serious, leading to more reliance on the car, fewer local jobs and services, a breakdown in some places of civic pride and identity, and potentially to the undermining of local communities. They argue these trends have been exacerbated by the lack of investment in the public realm constituting the physical streetscape and civic amenities such as local libraries, community halls, etc. that historically have clustered on the high street. The All-Party Parliamentary Small Shops Group conclude that many small shops will have ceased trading by 2015, with few independent businesses taking their place.

"Once a 'tipping point' is reached many small shops could be lost instantly as wholesalers no longer find it profitable to supply them. ... Their loss, largely the result of a heavily unbalanced trading environment, will damage the UK socially, economically and environmentally. People (as consumers and members of communities) stand to be disadvantaged the most, with restricted choice, entrenched social exclusion and a vulnerable supply chain caused by consolidation"
(All-Party Parliamentary Small Shops Group" (2006: 6).

Citing an assortment of evidence, in 2002 the New Economics Foundation (2003) had warned that hundreds of the country's high streets were reaching a tipping point beyond which there would be a complete unravelling of their retail fabric; taking the heart and soul out of many communities in the process. For them, not only are small independent shops shutting down at a fast rate (30,000 independent food, beverage and tobacco retailers between 1994 and 2002), but so to are the wholesalers that supply the sector, traditional pubs, post offices, banks, pharmacies, and a wide range of community buildings; all mainstays of the traditional high street.

Although the numbers of customers served by each local pub, bank or pharmacy individually will be relatively low, the impact of multiple losses on single high streets is far greater, as are the loss of multiplier effects caused by customers taking advantage of trips to conduct one type of business (e.g. to visit the bank) to conduct others (e.g. some shopping, having a coffee, etc). Arguably, therefore, each closure makes it more likely that others will follow, and as whole functions disappear from high streets, multiplier effects will disappear altogether. The New Economics Foundation identified financial services as a case-in-point as the area in most rapid decline.

Perhaps unsurprisingly, the British Council of Shopping Centres (BCSC – the voice of the retail property industry) paint a very different picture, one in which new retail development has a vitally important part to play in the regeneration of run down areas. Largely drawing evidence from case studies based on mega town centre retail developments of a type unknown on most local high streets, they argue that to re-vitalise the sector in today's difficult market conditions there is a need to reduce planning gain requirements such as those for affordable housing, roads and public realm improvements (DTZ 2009: 5).

An earlier report co-funded by BCSC and CABE looked specifically at the role of retail in regenerating smaller settlements, including traditional high street settings such as Bexleyheath in South-east London, a centre significantly impacted by the presence of the Bluewater regional shopping centre on its doorstep. Although pre-dating the credit-crunch, the findings are relevant and include a number of fundamentals that would apply to high streets of all sizes (Carmona et al 2004: 2-4):

- High streets need to differentiate to survive. Not every retail location can be a prime destination, so lower order destinations need to recognise their local role and potential, and plan positively to achieve them. This might include developing an independent retailer strategy.
- Retail centres of all types do not sit in isolation, but within a catchment that serves them and that also needs supporting. Investing in a high street will encourage development within its catchment, and development within its catchment will support the high street.
- Recognise the unique strengths and weaknesses of location and actively plan to exploit or change them. These might relate to public realm quality, parking availability, public transport connections, presence of heritage assets, and the mix of non-retail services and amenities.
- Actively manage smaller centres, exploring the potential of Business Improvement Districts (BIDs) to engage local businesses.



Derelict shop units, Redbridge



Peeling paintwork to signs. Peckham

2.2.2 High costs

The local high street is typically characterised by large numbers of relatively small properties in a diverse range of ownerships. Most retail units and many commercial units are occupied on the basis of leases rather than freeholds, a practice favoured by occupiers to allow them to react more swiftly and at lower risk to changes in the business cycle. However, the dominance of national and multi-national chains in major high streets, and their recent move into many local high streets has raised rents to levels that make space unaffordable to independent operators. The All-Party Parliamentary Small Shops Group (2006: 38) cites evidence that property costs are the second biggest cost for retailers (after wages) and have tended to rise much faster than sales growth.

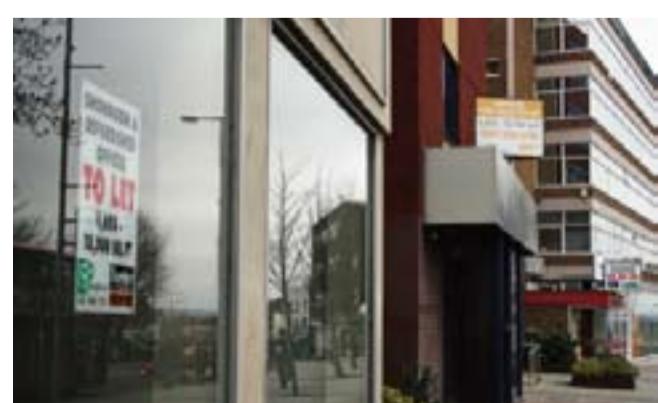
see table (right)

The British Retail Consortium (2009: 8) confirm these trends, citing the rapid rise in property costs during the high growth years leaving property costs at levels unrelated to 2009 sales and profitability. The relative stability of retail rental across London in recent months, despite the recession, seems to confirm this (www.royalsofrent.com). The New Economics Foundation (2004) argue that small retailers in particular do not have the necessary power and knowledge to negotiate a favourable deal from a position of strength, and nor is help available to fill the knowledge gap. Moreover, because the 2010 revaluation of business rates will be based on April 2008 valuations, further costs have yet to be imposed on the sector.

As well as general increases in costs across the sector, local high streets are often historic in origin and sensitive to changes in their physical fabric. Imposition of VAT on building refurbishments (and its absence in new build), restrictions and costs associated with modifying historic buildings, and the costs and restrictions associated with changes in land use or in making modest aesthetic changes mean that the real estate costs of trading in a high street may exceed non-high street (out of town) locations. In some cases the physical fabric of high streets has simply been left to decline, in others, the costs further undermine the competitive position of independents (All-Party Parliamentary Small Shops Group 2006: 37-48).

Borough	Avg rental asking price May 2009	% monthly change	Avg rental asking price May 2008
<i>Kensington and Chelsea</i>	£3,189	0.4%	£3,421
<i>City of Westminster</i>	£3,024	0.7%	£3,202
<i>Camden</i>	£2,476	-0.2%	£2,651
<i>Hammersmith & Fulham</i>	£2,232	1.2%	£2,380
<i>Barnet</i>	£1,722	0.9%	£1,836
<i>Richmond upon Thames</i>	£1,703	1.0%	£1,887
<i>Islington</i>	£1,698	2.0%	£1,875
<i>City of London</i>	£1,648	-1.3%	£1,696
<i>Wandsworth</i>	£1,647	0.9%	£1,801
<i>Haringey</i>	£1,625	0.4%	£1,667
<i>Merton</i>	£1,575	3.8%	£1,776
<i>Tower Hamlets</i>	£1,523	-0.3%	£1,761
<i>Ealing</i>	£1,521	-0.3%	£1,521
<i>Kingston upon Thames</i>	£1,470	0.5%	£1,542
<i>Hackney</i>	£1,450	0.9%	£1,474
<i>Brent</i>	£1,431	1.3%	£1,481
<i>Hounslow</i>	£1,408	1.7%	£1,520
<i>Lambeth</i>	£1,405	0.1%	£1,585
<i>Southwark</i>	£1,372	0.1%	£1,468
<i>Bromley</i>	£1,251	-0.6%	£1,317
<i>Greenwich</i>	£1,250	-0.1%	£1,234
<i>Harrow</i>	£1,230	1.0%	£1,276
<i>Enfield</i>	£1,225	0.0%	£1,269
<i>Hillingdon</i>	£1,171	1.5%	£1,141
<i>Newham</i>	£1,153	-1.2%	£1,271
<i>Lewisham</i>	£1,140	-0.2%	£1,198
<i>Sutton</i>	£1,107	-0.4%	£1,164
<i>Redbridge</i>	£1,101	0.5%	£1,147
<i> Havering</i>	£1,079	1.5%	£1,185
<i>Croydon</i>	£1,067	0.2%	£1,105
<i>Waltham Forest</i>	£1,014	-1.2%	£1,080
<i>Bexley</i>	£949	0.3%	£980
<i>Barking & Dagenham</i>	£916	0.5%	£980
<i>London Average</i>	£1,630	0.4%	£1,746

Table: Retail rents across London



Office space to let in Wembley.

2.3 Exchange issues

2.3.1 Ignoring the exchange dimension

It has already been argued in section 1.2 (above) that frequently a holistic view of high streets is missing. So too is any clear responsibility for the critical 'exchange' dimension that is so important to establishing high streets as real 'places' as opposed to simple functional spaces. In their research, Jones et al (2007b: 50) identified a range of high street user types:

1. Striders, who are simply passing through
2. Browsers, the widow-shoppers, tourists and visitors
3. Socialisers, there to be seen and to converse with others
4. Observers, watching the world and other people go by
5. Waiters, for feasts at agreed landmarks
6. Resters, recuperating, particularly the elderly or those with young children
7. Queuers, for the bus, taxi, cash machine, club, shop to open, etc.
8. Workers, for whom the street is their place of work, both legal and illegal
9. Entertainers, busking to earn a living
10. Customers, buying goods, tickets, services
11. Inhabiters, for whom the street is their home, at least during the day.

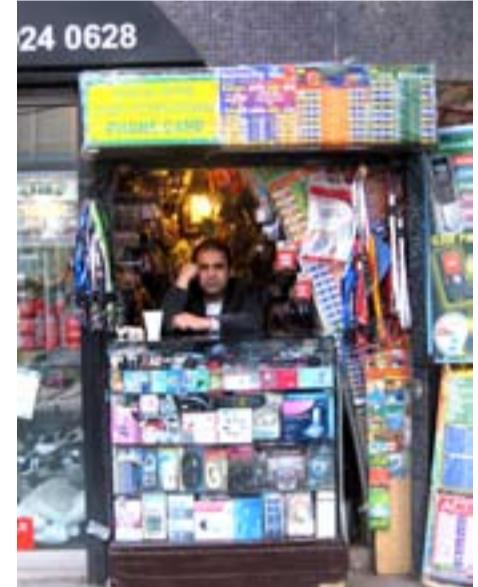
They also identify the wide age range of high street users, the typically inclusive and multi-cultural nature of high streets, but also the difficulty of some with physical impairments or with young children in buggies from accessing and using these spaces. These factors, however, varied hugely across their case studies depending on the profiles of each high street's user catchment (Jones et al 2007b: 54-56). This suggests, that very careful analysis is required to understand who the users of high streets are likely to be, and what are their requirements.

Unfortunately, although decisions will be taken day-in day-out on issues that effect the 'exchange potential' of high streets – on new uses for buildings, maintenance regimes, policing, etc. – typically no one will be actively considering whether the impact is positive or negative, how different user groups and types of users are being catered for, or what the long-term potential of the street is as a socio-cultural space. In Tooting, for example, street users deplore the multiplicity of signage and street furniture of all sorts that further restrict the footway for pedestrians. One businessman commented to Jones et al (2007b: 78) that he needed to organise four different types of rubbish to be collected from his one premises alone, and that bin bags of various types had become almost permanent features of the high street, in the process helping to undermine it as a pleasant place to be.

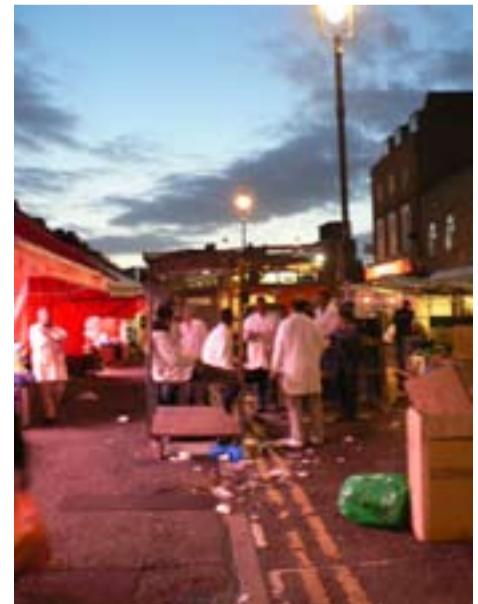
2.3.2 Crime and fear of crime

One issue that has dominated much writing on town centre attractiveness is the question of crime, and in particular a perception widely spread in the media that high streets are unsafe places and the harbingers of high crime. The analysis of Jones et al (2007a: 3; 2007b: 75), however revealed that high street users have few adverse concerns around anti-social behaviour and crime, but worry instead about the overall condition and cleanliness of streets. Thus signs of graffiti and neglect seemed to increase perceptions that high streets were unsafe to visit at night.

Despite the evidence that high streets are on the whole safe places (see 3.5.1), the British Retail Consortium (2009: 22) stress the importance of managing high streets so that they are perceived to be safe places by users. For them this involves removing signs of crime and anti-social behaviour as soon as they occur, and using active management techniques to discourage crime in the first place, including CCTV, coordinated intelligence and information sharing, street patrols, active management by all agencies, and the use where necessary of various forms of exclusion order. They argue that retail crime costs the economy £1 billion annually, that this is rising in the recession, and that it impacts most decisively on the high street's independents and small businesses.



Enterprising use of high street location
Peckham



Exchange: Places to work and meet.
Dalston

2.4 Movement issues

2.4.1 Roads or streets?

The relationship between movement and social activities has long been the focus of research to understand the inter-relationships between the two. In a famous study Appleyard & Lintell (1972) compared three San Francisco streets that, while similar in many ways, varied in the amount of traffic travelling along them. On the heavily trafficked street, people tended to use the sidewalk only as a pathway between home and final destination. On the lightly trafficked street, there was an active social life and people used the sidewalks and the corner stores as places to meet and initiate interaction. The high-volume street was seen as a less friendly place to live than the lightly trafficked street. The study brought in to sharp relief the strong inverse relationship between the relative dominance of traffic along a street and its qualities as a place for people to interact and conduct other forms of exchange activity. Yet, the Department for Transport (2008a: 2) admit that high streets are usually the most difficult streets to improve, because:

- There is nowhere else for the traffic to go
- There are concerns about the impact on local traders of any restrictions
- There have often been many previous failed attempts to improve many high streets
- There is often a conflict of interests between different users.

Jones et al (2007a) conclude that to realise their potential, the different functions of high streets need to be better balanced in order to take due account of their function as 'places' to shop and visit as well as their role as 'links' in providing routes for road traffic. CABE (2008) for their part have suggested that to re-civilise streets, a new hierarchy of street design should be adopted, one that considers pedestrians first, then cyclists, public transport users, specialist service vehicles (emergency, waste, etc.) and lastly other motor traffic. This would specifically recognise and prioritise the important role of streets in encouraging the development of stronger and safer communities, living more healthy and sustainable lives.

Yet analysis has suggested that the competition for space between different street activities and modes of transport remains a source of tension and conflict (Jones et al 2007a: 3). To borrow Jan Gehl's (1996) notion of 'necessary' and 'optional' activities, there remains a general dissatisfaction with the role of high streets as positive places that users would opt to spend time in, as opposed to places for conducting the day to day necessities of life. It seems that although mixed-use high streets are highly valued by their users, the street experience could be much improved.

3.4.2 Pedestrian safety

Jones et al (2007: 91-93) reveal a related safety concern associated with the use of high streets as public transport interchanges, and the problem of vehicle / pedestrian accidents brought on by people rushing across roads to board buses, or stepping out behind buses into the line of traffic. This dimension of road safety represents just one of the many potential conflicts between vehicles and pedestrians using the same busy high street space. Indeed the Government's road safety strategy Tomorrow's Roads, Safer for Everyone (DETR 2000) reveals that high streets are amongst the least safe of urban roads for accidents. (see also 2.1.1).

Nevertheless, with careful design that reflects a better balance between pedestrian and traffic needs (rather than rigid separation), the Department for Transport's (2008b: 43) own research into Mixed Priority Routes (see 5.2.1) has shown dramatic reductions in casualties of between 24 and 60 percent through adopting some basic design principles:

- Use of informal crossings to respond to pedestrian desire lines, and to improve the availability of crossing points.
- Reduction in vehicle speed through the careful use of vertical or horizontal deflections and constrained carriageway widths.

- Strategic use of traffic signal design to help reduce traffic speed.
- Rationalisation and improvement of the parking and loading arrangements.

As the Department for Transport (2007b: 42) admit, schemes of this nature need to be developed from first principles, whilst organisations tend to be risk averse, staying close to established guidance and previous ways of doing things. They argue that there needs to be a culture from the top of doing things differently, and a willingness to allow time to explore unconventional approaches.

2.4.3 Poor servicing and parking

High streets suffer a further disadvantage when set against out of town equivalents, the availability of plentiful free parking at the latter compared with its absence in the former. In London, this is exacerbated by the location of many high streets on red routes. Designed to encourage traffic to flow more freely by banning parking, these and other parking restrictions have unintended consequences for mixed used streets by making it very difficult to service units along their length (e.g. deliveries), making it virtually impossible for car borne customers to park, and, in the process, increasing traffic and parking stress on surrounding neighbourhood streets. In evidence to the All-Party Parliamentary Small Shops Group (2006: 41) the Head of Government and Public Affairs at ASDA commented

"It is self defeating to make it difficult to park: customers simply go elsewhere. There must be adequate parking in local neighbourhoods".

The British Retail Consortium (2009: 19) confirm the importance of plentiful, convenient, attractive and secure parking in order to support high street competitiveness. They argue that parking should not be seen as a problem, or as a revenue raising device, but instead as a management tool; for example suspending charges during off-peak times in order to encourage visitors and increase high street vitality. They suggest, the needs of public transport (e.g. space for bus pull-ins and taxi stands) and servicing (e.g. removing night time delivery curfews wherever possible) also need to be carefully considered and managed in an integrated manner alongside the parking strategy. (see also 3.5.3 and 4.5.2).



Pavements over capacity in Peckham

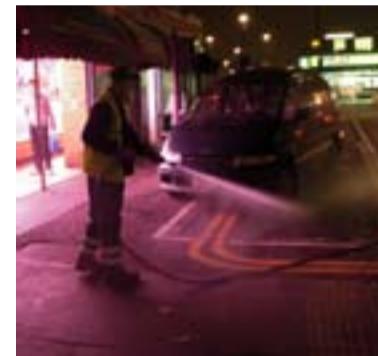
2.5 Management issues

As research on the management of public space has shown (Carmona et al 2008), in a context where responsibility for the whole is often so disastrously fragmented, this makes the long-term stewardship of high streets a particularly 'wicked' problem, and one where the question of 'quality' is often low on the agendas of many key stakeholders. Too often the different agencies and stakeholders with a role to play will see the high street from a narrow sectorial viewpoint: planners in terms of concentrations of land uses; transport planners in terms of the flow of traffic; property owners in terms of income streams from their property assets; etc. In other words no one takes a 'holistic' view of the issues impacting on high streets. Indeed, as suggested in the analytical framework (see section 1.2.2), no one will have responsibility for shaping high streets as coherent multi-functional 'places'. So, although ad-hoc decisions will be taken every day that effect the quality and functionality of high streets, typically decisions will be taken without considering whether the impact is positive or negative on the whole, or what the long-term vision for the street should be.

These problems may be exacerbated by the linear nature of high streets which often contrast dramatically (in character and quality) with their immediate hinterlands, often have no coherent voice arguing their case, inconveniently cross local administrative and political boundaries, and may not be substantial enough to merit particular attention, for example of a town centre manager. This, Jones et al (2007a) argue, will require the better co-ordination between the various agencies responsible for their management of the type undertaken by Town Centre Management, as well as a formal dialogue with local street-user groups.



Unclear pavement ownership. Peckham



After market street cleaning.
Dalston.



Shops 'claiming' land at the rear.
Wembley

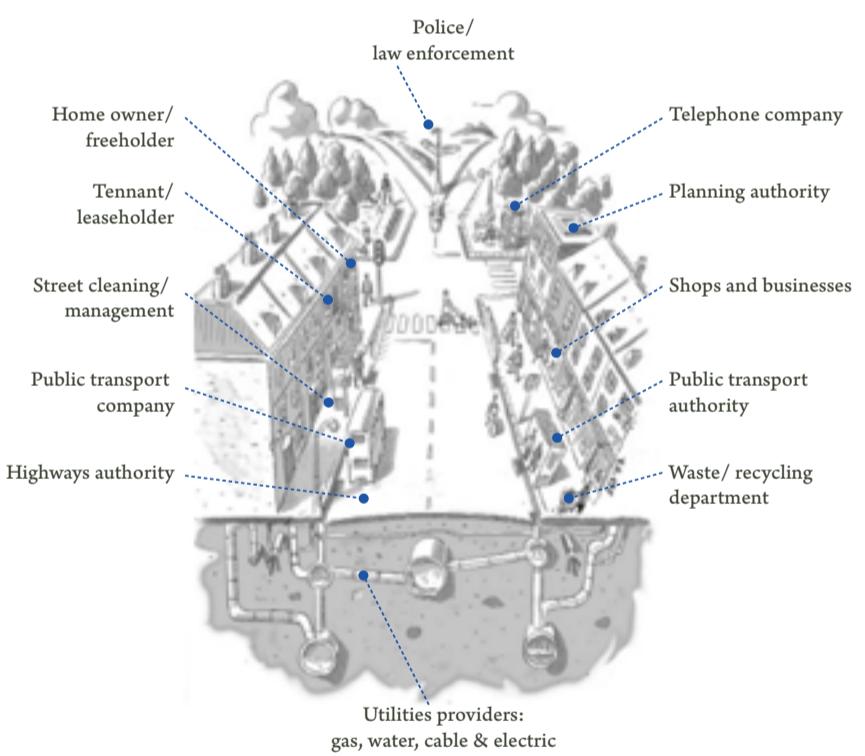


Diagram: fragmented high street management

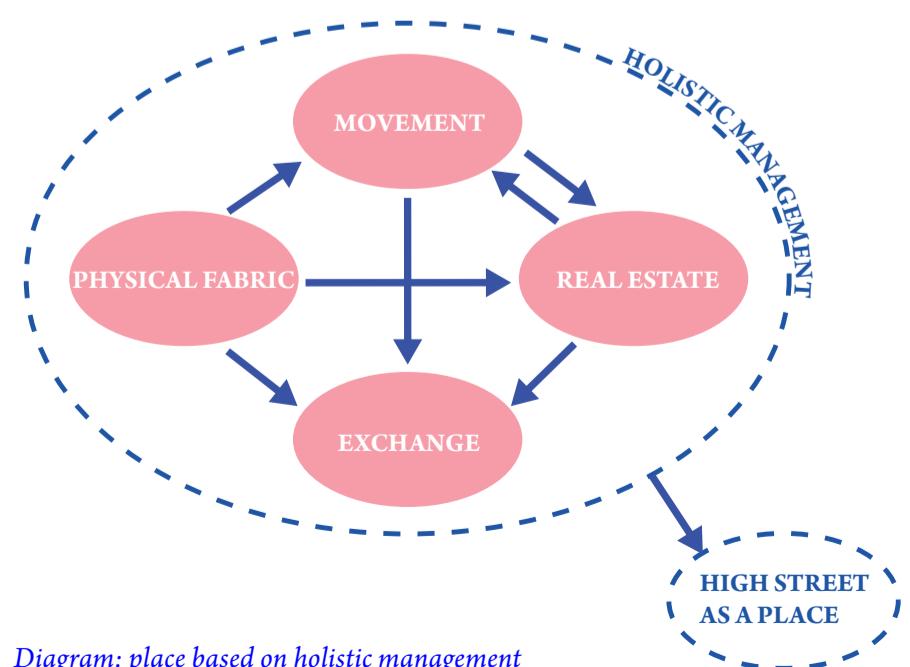


Diagram: place based on holistic management

2.6 Conclusion, towards a holistic place-based view

The literature review revealed a diverse range of issues impacting on high streets across the four high street functions and the overarching issue of high street management. They can be summarised in terms of strengths, weaknesses, opportunities and threats.

see table (below)

Logically, therefore, to maximise the potential of high streets, strategies will need to be found that utilise the strengths, address the weaknesses, harness the opportunities and neutralise the threats. It is important, however, to stress an overarching finding from the literature review that every high street is unique; a product of its own local set of strengths, weaknesses, opportunities and threats. As such, although the literature suggests a range of generic high street issues, these may or may not be pertinent to local circumstances.

Common to every high street, however, will be the potential conflicts and multiplier effects to be understood and balanced in order to optimise the potential of high streets as places where the needs of movement are reconciled within the physical fabric in a manner that maintains a viable real estate market and supports a vital and safe social environment. In this endeavour:

- The physical fabric will play a critical three-way role; enabling or disabling the other high street functions
- Movement, both in and through a high street, will determine its land use and market viability, but if too intense may also undermine its exchange potential
- The real estate mix will influence the attraction of the high street to users, who, once there, will generate exchange potential
- *Inter alia*, the exchange function will be determined by the physical, movement and real estate qualities generated by the particular context.

As hypothesised in section 1.2 (above) the challenge is to seek to mould, in a holistic sense, the nature of each high street as a 'place', enhancing it through positive and proactive management in and between the physical, real estate, exchange and movement dimensions

Issues	Strengths	Weaknesses	Opportunities	Threats
Management	<ul style="list-style-type: none"> • Diversity of interests • Multi-disciplinary perspectives 	<ul style="list-style-type: none"> • Complex management environment • Fragmented governance • Ad hoc decisions • No holistic vision • No coherent user voice 	<ul style="list-style-type: none"> • Better coordination of responsibilities • Engaging with street-user groups • Active management through TCM or BIDs • Differentiation strategies 	<ul style="list-style-type: none"> • Failure to recognise their value • Failure to learn
Real Estate	<ul style="list-style-type: none"> • Huge sunk investments (public and private) • Diversity of investors • Genuine diverse mixed use 	<ul style="list-style-type: none"> • Decline in high street retail • Decline in independent retailers • Closure of key local services • Decline in civic amenities • Reduced multiplier effects • Increased costs – rent, rates, alterations 	<ul style="list-style-type: none"> • Reduced planning gain requirements • Invest in the catchment • Growth in the convenience market • Better small business advice • Efficient public sector investment vehicle 	<ul style="list-style-type: none"> • Danger of reaching a tipping point • Crude planning • Competition from out of town retail • Vulnerability of chain stores
Physical	<ul style="list-style-type: none"> • Historic and distinctive fabric • Robust fabric • Adaptable to change 	<ul style="list-style-type: none"> • Poor public realm • Decline of heritage assets • Street furniture clutter • Poor cleanliness and maintenance • Cloning and loss of local identity • Poor lighting 	<ul style="list-style-type: none"> • Public realm investment raising economic value • Stated user willingness to pay for improvement • Reinforce distinct sense of place • Simplified streetscape schemes 	<ul style="list-style-type: none"> • Failure to reinvest • Continued poor management • Continued leaching of diversity
Exchange	<ul style="list-style-type: none"> • Natural social venues • Diverse range of user groups • Low actual crime • Diverse economic activity 	<ul style="list-style-type: none"> • Lack of responsibility for exchange functions • Poor understanding of user profile • Chain stores reducing local wealth recycling • Conflict with functional concerns • High perception of crime 	<ul style="list-style-type: none"> • New markets, events, social activities • Active management to reduce fear of crime 	<ul style="list-style-type: none"> • Eventual decline of community • Entrenched social exclusion
Movement	<ul style="list-style-type: none"> • Well connected • Natural movement corridors 	<ul style="list-style-type: none"> • Conflict for space • Culture of separation and traffic flow efficiency • High traffic load • Poor integration of public transport • High accident potential • Lack and cost of parking • Servicing restrictions • Inadequate cycle facilities 	<ul style="list-style-type: none"> • Traffic calming • Pedestrian oriented crossing points • Parking as a management tool • Bus pull-ins 	<ul style="list-style-type: none"> • Future growth in traffic • Dominance of buses • Failure to address pedestrian needs

Table: SWOT analysis: a holistic view

PART B:

LONDON'S HIGH STREETS

03 A Strategic Picture: What is the nature of London's High Streets today?

3.1 Specific to London

The review of literature and research on high streets revealed a range of insights into the challenges facing high streets. However, during the course of our research it has become clear that the characteristics of London's high streets are, to some extent, distinct, and it is unhelpful to generalise about the nature of high streets across the UK.

Although there are common socio-economic parameters, the issues relating to scale, spatial distribution, movement and the relationship between different high roads necessitates a view of high streets that is specific to London. There are likely to be differences between high streets in smaller town centres, where they are the primary retail location and those in cities, where there is a much more complex hierarchy of choices and movement issues affecting each high street.

For example, we noted that when a number of high streets were studied in more detail, **overall there was a surprisingly high incidence of small or independent stores, in contrast with the findings of the New Economics Foundation report, Clone Town Britain, previously cited.** Although big brands may dominate on Oxford Street, the same cannot be said for Wembley or Tottenham High Road. There are other ways in which the web of high streets within London is likely to be distinct in their diversity of land use and richness of offer, and therefore this report acknowledges the particularity of high streets in a specifically London context.

3.2 Mapping London's high streets

A striking feature of the existing literature is how much work in this area is either polemical, based on expert opinion, or grounded in small numbers of local case studies. All such work is valuable, but there has been little systematic analysis of quantitative data as it relates to high streets. An accurate picture of high streets today is therefore difficult to obtain. An important task of the project was to use existing London-wide data sources to better understand London's high streets.

A full explanation of the data, methods and limitations of this part of the study is included in Appendix B, but briefly, this stage of the work utilised twelve key data sources to map seven critical concerns:

- **High street locations:**
Ordnance Survey historic maps, Cities Revealed Land Use Dataset and the A to Z
- **Development potential:**
LDA Brownfield site database and GLA Strategic Housing Land Availability Assessment (SHLAA)
- **Employment:**
Annual Business Inquiry data from the Office for National Statistics, Ordnance Survey Address Point Dataset, and on-site count of a 51 km length of road – Romford, to Uxbridge
- **Transport accessibility:**
TfL Public Transport Accessibility Index
- **Resident population:**
National Census Population data (2001 and 2008 mid-year population estimates) and Ordnance Survey Address Point Dataset
- **Pollution:**
GLA London Atmospheric Emissions Inventory
- **GP practice locations:**
TfL Assess to Opportunities and Services data

London-wide GIS maps were produced for each dataset, and data analysed to reveal the correlation between each issue and the presence of high streets.

For the first time a picture is revealed of the vital strategic role of London's high streets, and their central importance as a structural element in London's growth and on-going functioning.

The picture is supplemented with evidence from published sources and recent reports.



Peckham

SR
01
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What is the nature of London's High Streets today?
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3.3 Physical fabric

3.3.1 The growth of London's high streets

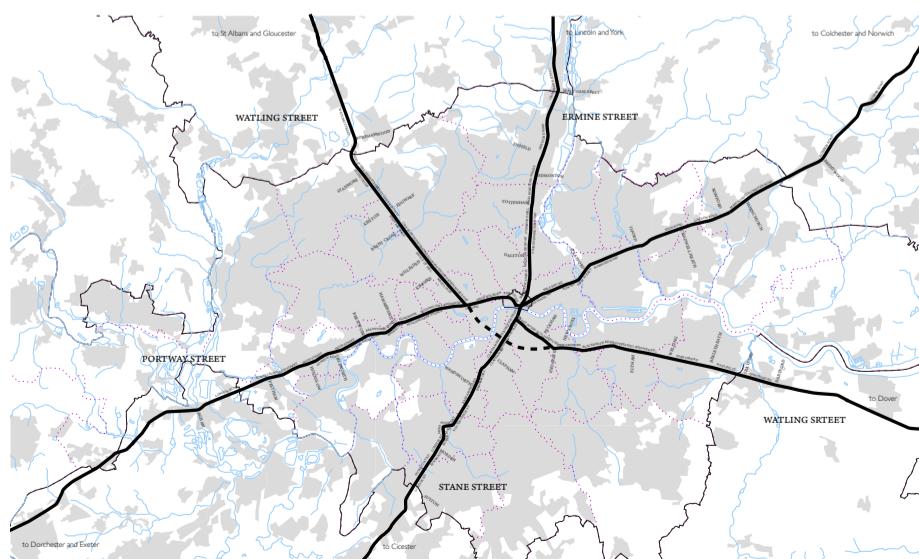
Historic maps of London reveal two primary explanations for the locations of London's high streets, based respectively on their 'link' and 'place' functions (see 1.1.5). First, a story routed in the early development of London as a Roman settlement from the invasion of 43 AD to the end of occupation approximately 350 years later. During this period, the construction of Roman roads from the city to other Roman settlements – Bath, Lincoln, Canterbury, etc. – provided a network of links – Watling Street, Portway Street, Ermine Street, etc. – that have survived through to this day. As London began to grow beyond its walls from the 16th Century onwards, these created a structuring devise for the growing city. Along them development of all types naturally spread, taking advantage of the increased opportunities for trade that was to be had along these busy roads, and the advantages of direct links back into London (see 1.1.2).

The mixed use development that grew up along the routes (and others such as the Commercial Road that developed later), created many of the high streets that we still see in London today. In places these lines of mixed development create a more or less continuous high street, for example at Streatham. Elsewhere they were reinforced by already pre-existing concentrations of activity, for example at Highgate or Wandsworth, where the new roads passed through established settlements that have then developed and grown as a consequence.

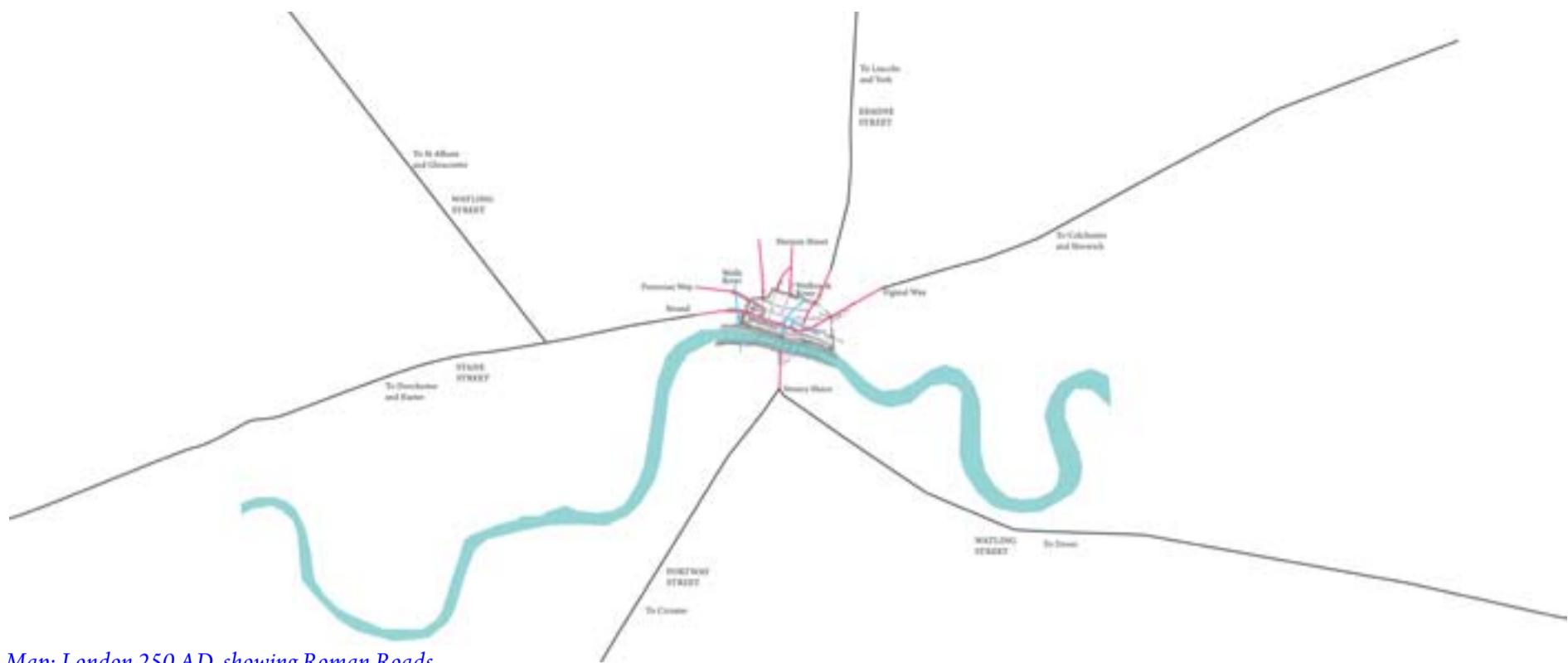
see map (below)

In contrast to these 'link'-based streets, a second type of high street has grown up independently of these major radial routes, growing instead as an initial consequence of 'place'. Steen Eiler Rasmussen (1934) famously described London as 'The Unique City', applauding the scattered, seemingly un-planned and open fabric that had derived from the agglomeration of its numerous historic towns and villages. The origins of many of these is uncertain, but it is likely that some grew up around the convergence of particular local routes, whilst others may have derived initially from other locational advantages – a river, a well, a protected position, etc. – only later becoming part of the movement network as routes developed between them and their neighbouring settlements and so on. Today these previously outlying settlements such as Hampstead, Greenwich and Dulwich are buried deep within the Greater London metropolis, but are still recognisable as towns or villages in their own right with their own centre of gravity focusing on their high streets. Some are now on major arterial or concentric routes through the city whilst others lie outside this meta-movement framework e.g. Rye Lane in Peckham.

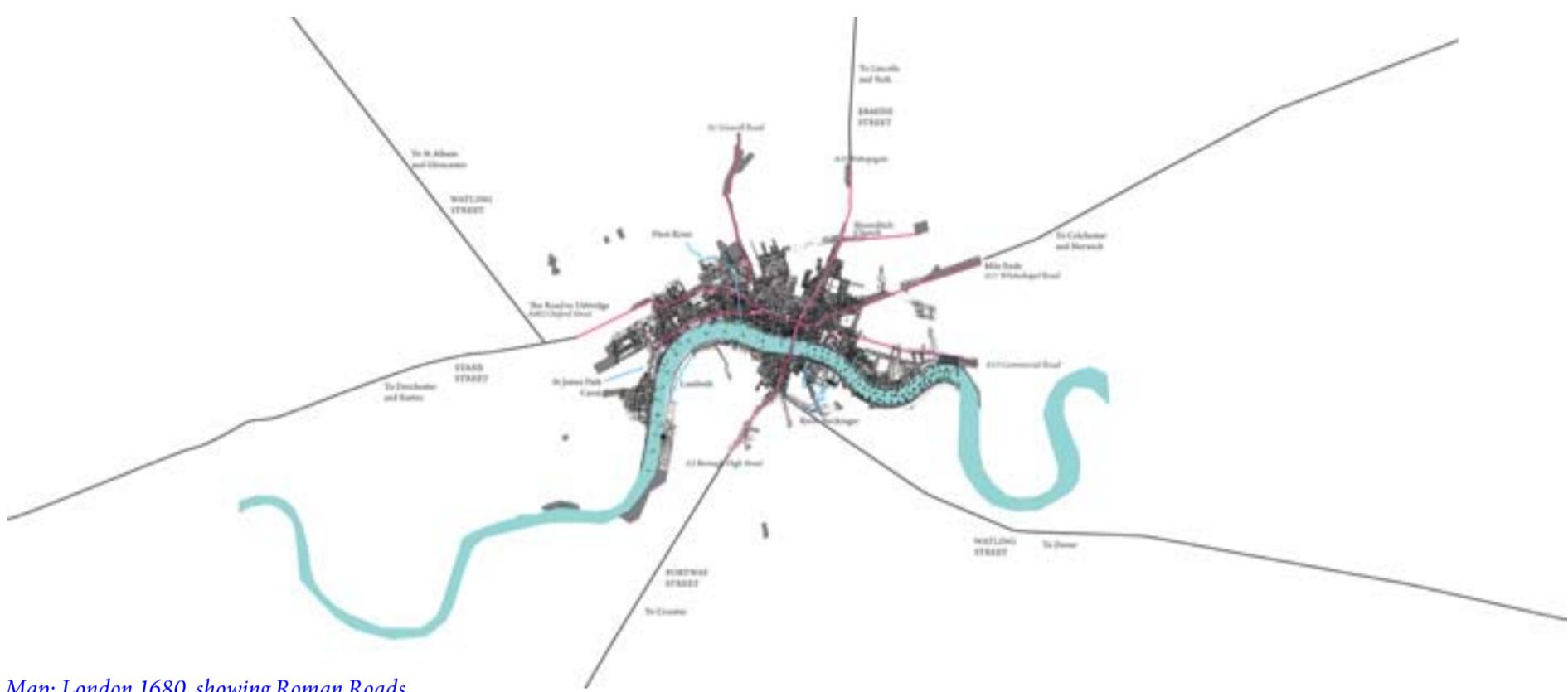
see map (right)



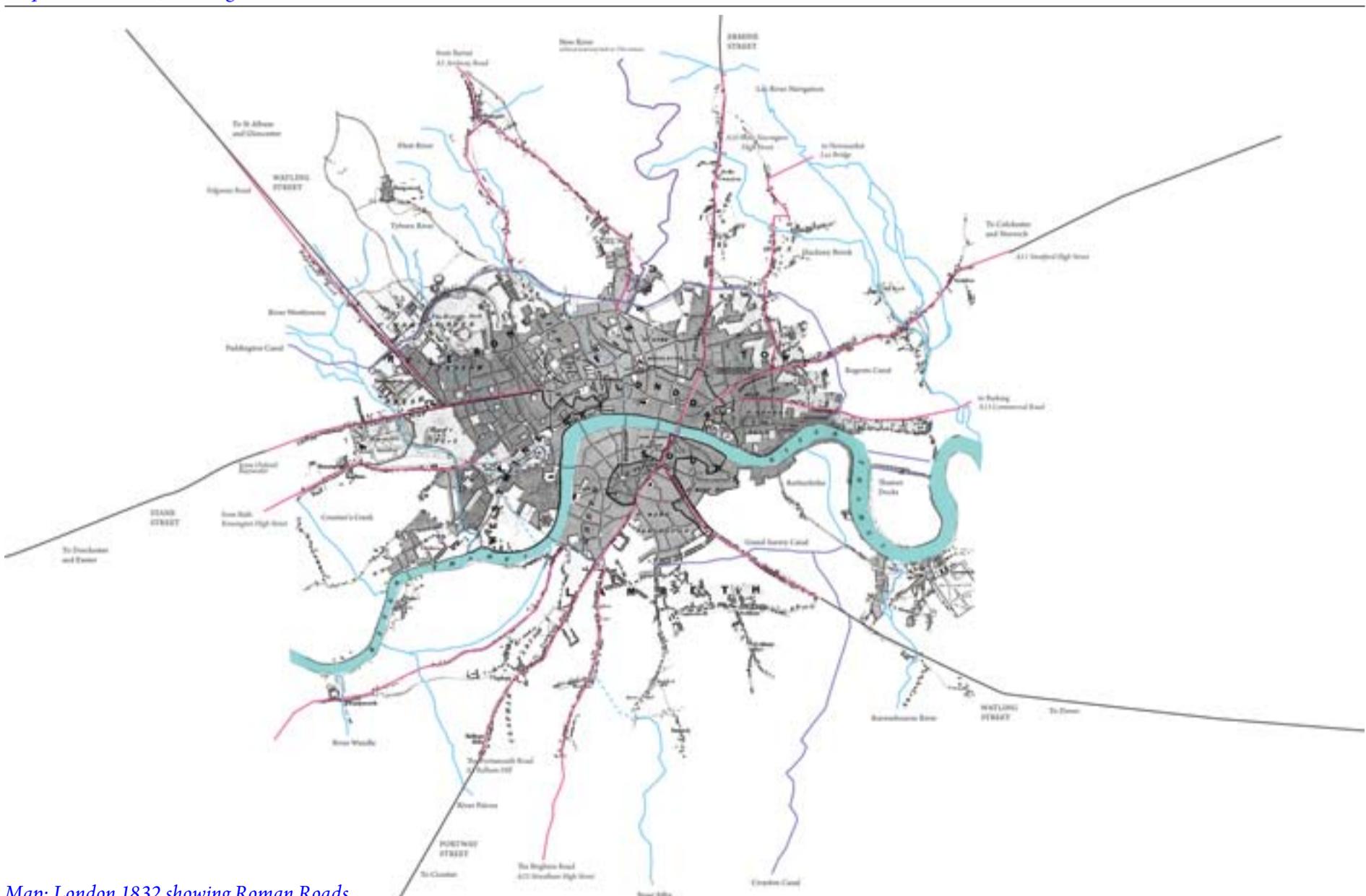
Roman Roads overlaid onto London today (Larger version in Appendix D)



Map: London 250 AD, showing Roman Roads



Map: London 1680, showing Roman Roads



Map: London 1832 showing Roman Roads

3.3.2 The extent and types of London's high streets

Today, the city is still largely dependent on the historic routes through its fabric that connect and pass through its towns and villages. In this regard it is a city distinct from others such as Paris or Barcelona in that whilst it has its planned neighbourhoods (e.g. Bloomsbury), it is not a city of grand boulevards and civic set pieces. Instead, it is characterised by its continuous network of everyday streets, among which are its high streets with their connected and adaptable mixed use character, giving rise to an intensity of social and economic exchange (see 2.1 above).

Although the term 'high street' is preferred to 'high road' throughout this project, both come under the scope of the project. Using the A to Z to map all roads across London with either suffix to their name reveals around 113 stretches; a total that grows to around 130 if changes of name are taken into account as roads cross Borough or area boundaries. The exercise also reveals an interesting difference between high streets and high roads. Whereas high streets may well be small segments of longer roads, e.g. High Street Wembley is part of Harrow Road, high roads tend to be longer stretches that pass through a number of areas or centres. Analysis also reveals that many roads that would be regarded as mixed use high streets are not on the list e.g. Upper Richmond Road in Sheen, whilst others that are on the list have ceased to have any recognisable high street functions e.g. Erith High Street.

Refer to map (right). List of names in Appendix C

Clearly names do not represent the whole story. In order to get a more reliable picture of high street activity across London, and the physical locations of all London's actual 'high streets' (as opposed to those only named so), data from the Cities Revealed Land Use Dataset was used to map retail uses across London. In order to exclude individual corner shops and the like, and short runs of shops that might be best described as a local parade, 250 meters was taken as the minimum length for a high street, whilst a 50 meter buffer around each end ensured that lengths of shops with very small breaks in them (where the buffers did not overlap i.e. shorter than 100 metres) were counted as a single high street length.

The approach revealed 733 such lengths of high street across London, whilst manually sorting the lengths to exclude large stand-alone supermarkets and shopping centres such as Brent Cross, garden centres, retail parks and the like, and the more or less continuous agglomeration of mixed use streets in London's Central Activities Zone (CAZ), left 602 stretches of high street with an average length of 700 metres, but ranging from 350 metres to 3,780 metres.

Refer to 'Identified High Streets' map (overleaf). List of names in Appendix C

High Streets make up only

3.6% of London's road network

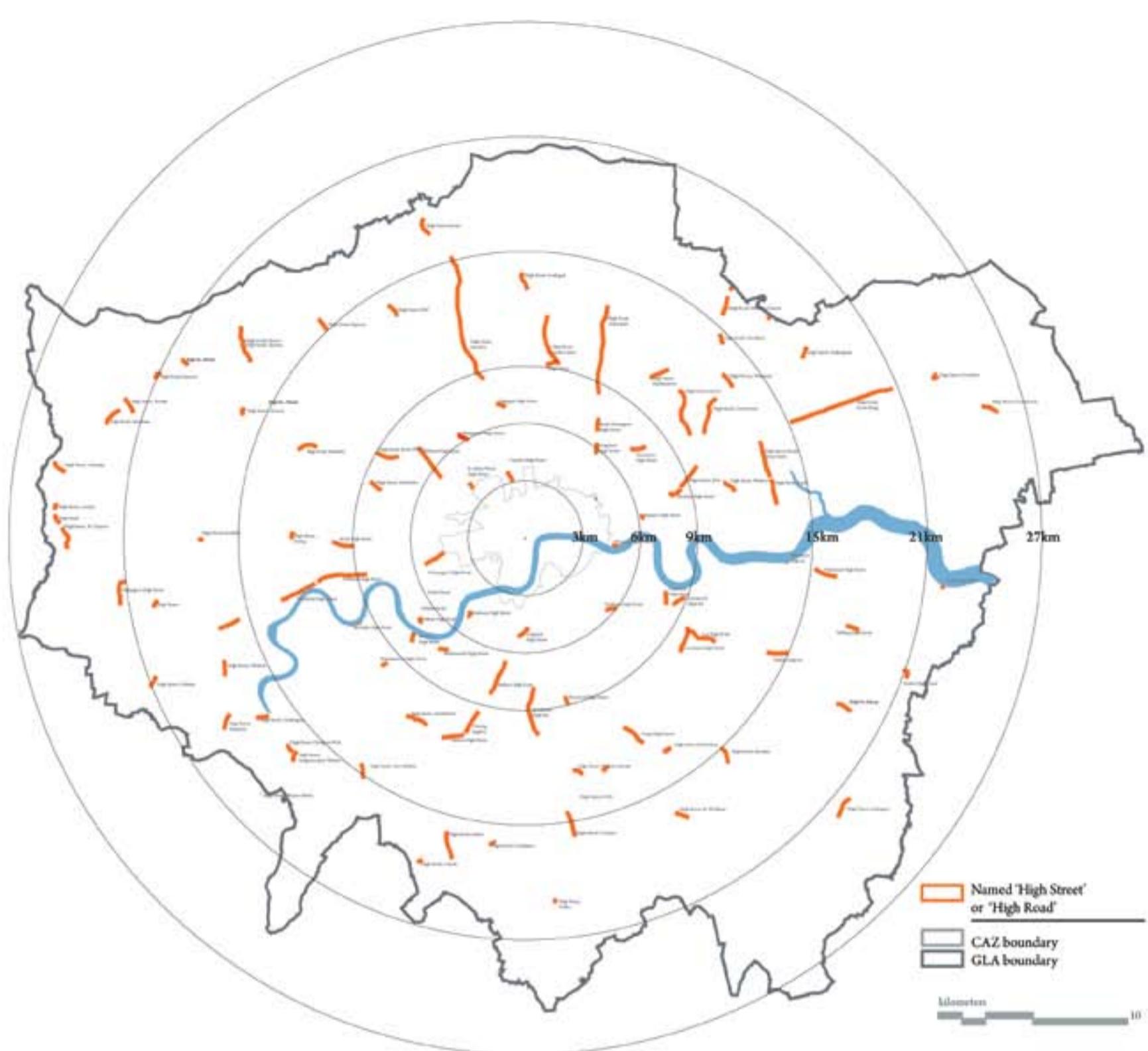
In total, high streets outside London's CAZ represent around 500Km of London's road network, or 3.6% of the 13,800Km of road in the city (TfL 2009: 4); a proportion that belies their significance both economically and socially (see below).

Although the very nature of high streets necessitates a mix of uses (see 2.3.1), the presence of retail is critical in this mix as streets without retail will never be perceived as high streets. As such, continuous strings of retail can be viewed as a proxy for a high street, especially as the Cities Revealed data takes a broad definition for 'retail' that includes traditional shops, former shops used as offices, pubs, restaurants and cafes, takeaways, supermarkets, showrooms, and petrol stations; all (except perhaps the latter) present in most London high streets.

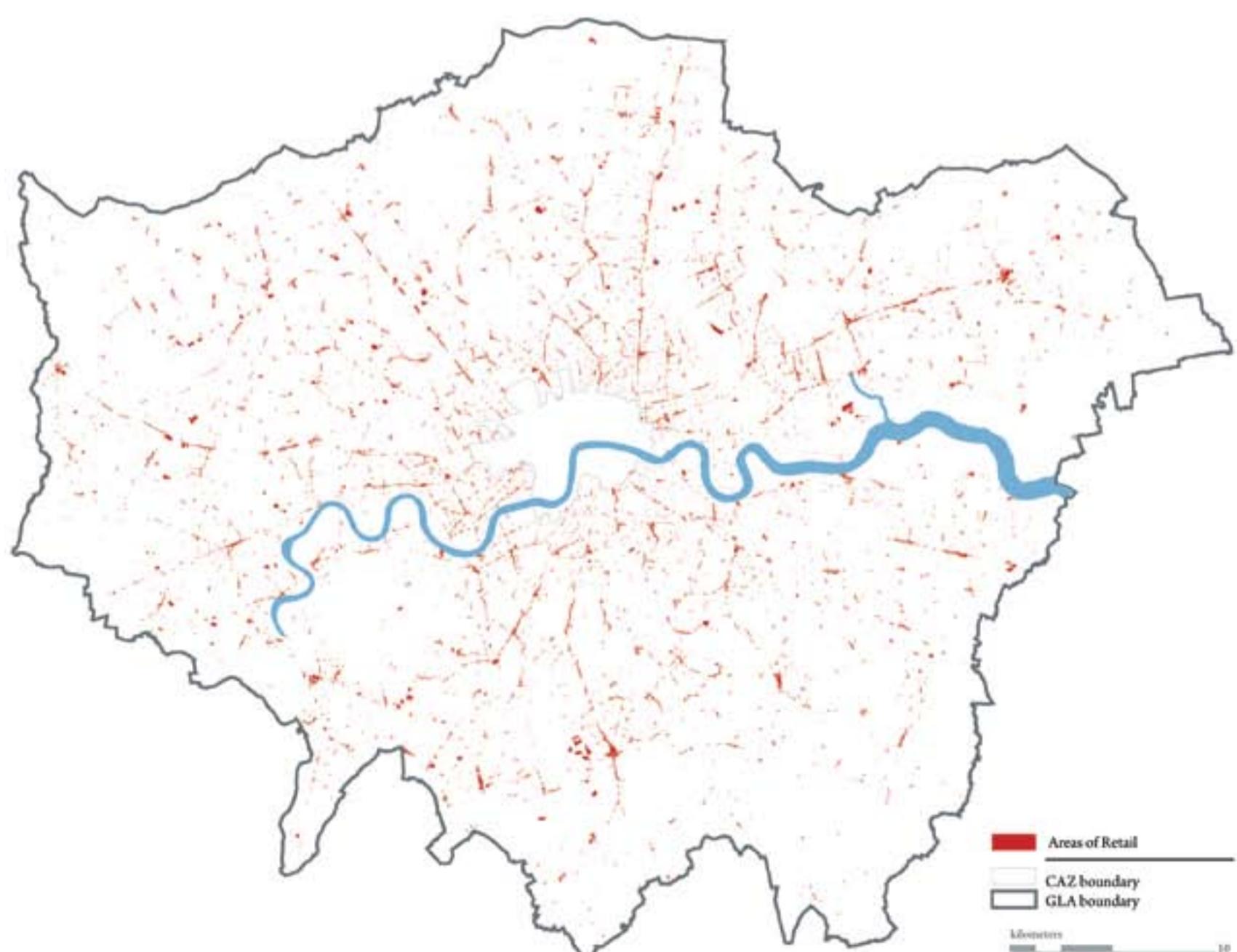
Once created, the GIS map of London's high streets could be used to build up a picture of these streets, providing a context against which relevant data covering aspects of real estate, land use, access and pollution can be extracted and compared. The exercise also reveals valuable information about the geographic pattern of London's high streets, notably:

- The presence of strong almost continuously 'connected high street' lines emanating from Central London along the routes discussed above
- Less obvious, but still identifiable concentric connected lines around Inner London, for example linking up Peckham to Camberwell, to Brixton, to Clapham
- The presence of shorter 'detached high street' lines along more local roads, sometimes joining up the radial routes, and sometimes not
- That the linear structures can be contrasted with a smaller number of clustered 'blobs' of retail activity, where high streets have grown into more concentrated town centres, for example Croydon to the far south of the map, or Romford to the far north east
- The polycentric nature of London, revealed in the presence of many smaller isolated high streets – particularly in Outer London – that sit beyond and seemingly separate to the linear high street routes or town centre clusters
- Finally, that outside of the concentrated cluster of retail in Central London, retail uses are well distributed in a reasonably even manner across Greater London, although with a slightly higher concentration to the north and west of the city and a slightly lower concentration to the south and east.

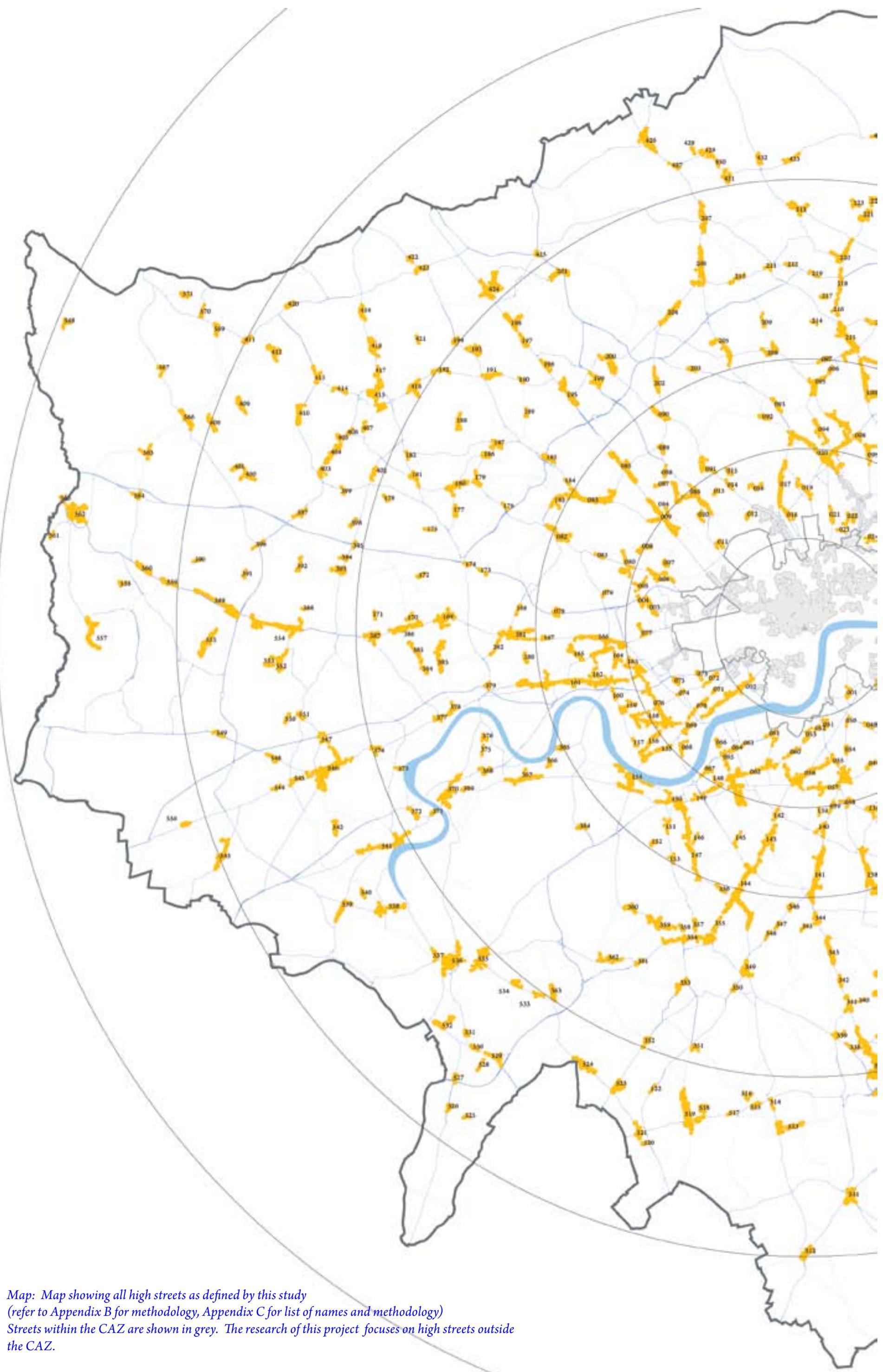
see Map of high street types on page 35-35

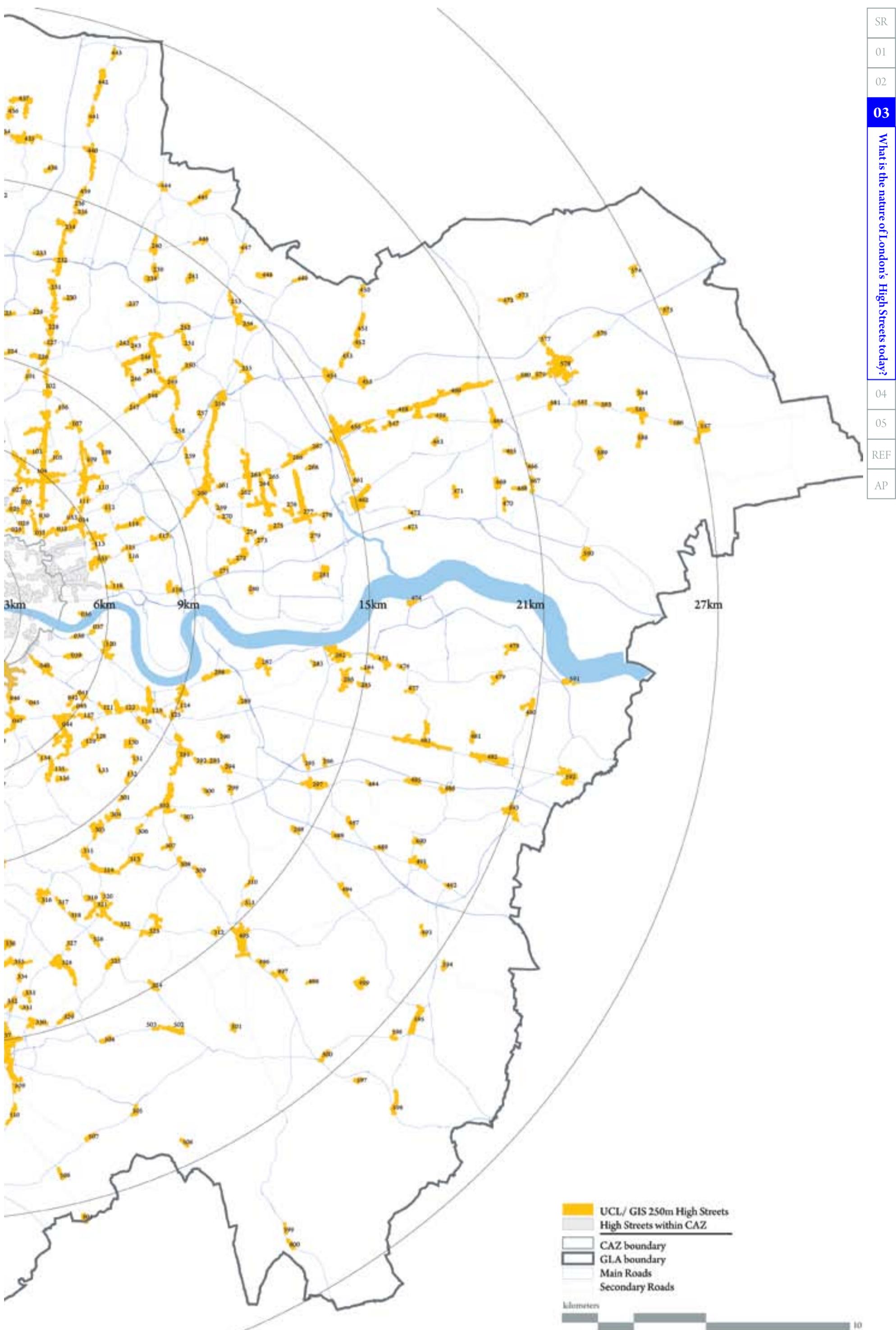


Map: roads named "high street" or "high road"



Map: retail land use in London excluding the CAZ
(Cities Revealed database)





3.4 Real Estate

3.4.1 London's Retail Sector

Retail is the most prominent function of high streets. In 2006, headline figures demonstrated the vital importance of retailing to London's economy.

Of every £10 spent by Londoners, almost £4 went to the retail sector whilst around 9% of Londoners worked in retail. The capital is home to 40,000 shops, many in its numerous high streets. Londoners spend more per head than any other part of the UK in the shops, and travel less to do their shopping (on average 1.9 miles for food shopping and 3.5 miles for non food) (GLA Economics 2006: 4-7, 15 & 31).

Londoners spend £4 of every £10 in the retail sector

Yet London, like elsewhere, has faced a consolidation of its retail offer (particularly in the grocery sector), a huge growth in out of town retailing, growth amongst its larger centres, and a consequential decline in local shopping and in some local high streets. In 2006, driven by increased population and levels of employment, GLA Economics (2006: 8) predicted a rising demand for retail space in London (despite increasing competition from the internet), and that most of London's town centres should be able to take advantage from this to expand their offer.

Despite the 2008 / 9 recession, recent evidence suggested a buoyant retail sector in the run up to Christmas 2009, with shops benefitting from an influx of visitors taking advantage of the weak pound (<http://www.dailymail.co.uk/news/article>). Moreover, although the end of Woolworths in January 2009 was followed by a wave of doom and gloom about the future of the high street, by November 2009, only five of the original 46 London stores still remained to be let (Urwin 2009b). Pound stores in particular seem to be thriving in the London market that now has 25% of the country's 1,423 discount stores, reflecting a move of this type of retailing into more affluent areas where they are helping to drive up footfall (Morris 2009).

From a business perspective, the London First Retail Commission (2009) argue that critical to the long-term health of London's high streets is a viable and diverse retail sector. For them, no one size fits all, and not every high street should try and emulate Marylebone High Street with its careful mix of small independent stores (see section 4.1); indeed the report argues that some of London's town centres have only remained strong during the current downturn because of the pull of the national and international brands. They argue, however, that strength should not be linked solely to the representation of multiple retailers. In Peckham, for example, they observe that representation of multiples is low, but the high street successfully caters for the diverse range of local ethnic requirements. Ealing, by comparison, has higher a representation of multiples, but is considered to be performing poorly (London First Retail Commission 2009: 12).

The Commission suggest that instead of focusing on standard solutions to London's high streets, it is critical to understand the diversity of role and provision represented across London's high streets and to prioritise areas in stress and target action accordingly. They also demonstrate that solutions to the problems high streets face will not all be physical, but will include better resourced and integrated management (via Town Centre Managers or BIDs), better local promotion, tackling perceptions of crime, enhanced small business support, enabling greater flexibility over changes to town centre uses, loyalty cards, valuing and supporting street markets, kiosks and pop-up shops as part of the local offer, and so forth (London First Retail Commission 2009).

GLA Economics (2006: 36) identify the particular costs associated with servicing shops in London, where, because of the density of development, off street delivery bays are rare, and, because of congestion, on-street parking restrictions are high. The result is a rate of parking tickets for delivery drivers in London that, they argue, impacts particularly on the costs of business for

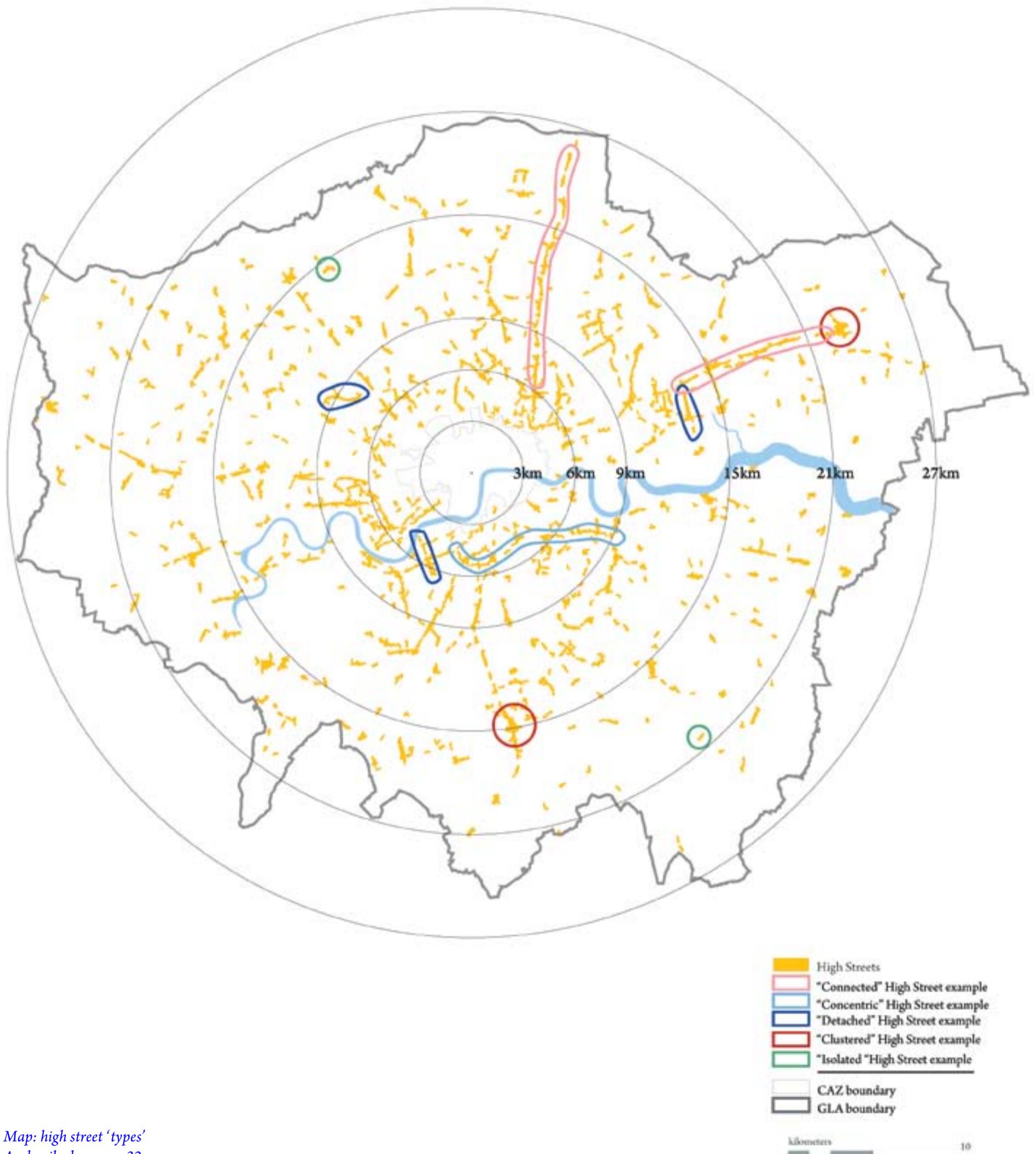
small independent retailers. This comes on top of rental costs that are in prime locations at least twice the costs of equivalent locations in other UK cities (Jones Lang LaSalle 2008).

3.4.2 Outer London

Whilst recognising that problems exist in some of London's high streets, two recent reports identify the vital role of the city's established high streets to the growth potential of Outer London. The Outer London Commission (2009) identifies the importance of utilising existing assets as the basis for future growth, establishing that the Outer London's town centre network may provide an opportunity for future growth. For them this needs to recognise the importance of walking to local centres, and that different centres should have different specialist roles. They argue that parking is a critical factor in the mix, reflecting the need to level the playing field between high street and out of town locations.

The Outer London Commission (2009) identify the importance of utilising existing assets as the basis for future growth

An earlier report on London's suburbs from London Councils (2009: 7-8) makes a similar case for investment in Outer London's town and district centres, and argues that local centres need to play to their strengths, for example Chiswick has been able to attract media companies from the west end who look for locations with a vibrant mix of facilities including good restaurants and bars. With people living more networked lives, the social, financial, and service networks that localities can offer will become ever more important in the future potential of London's suburbs; all services that have traditionally found a home on the high street. Therefore, despite the current problems they face, both reports identify significant opportunities for London's high streets.



Map: high street 'types'
As described on page 32.

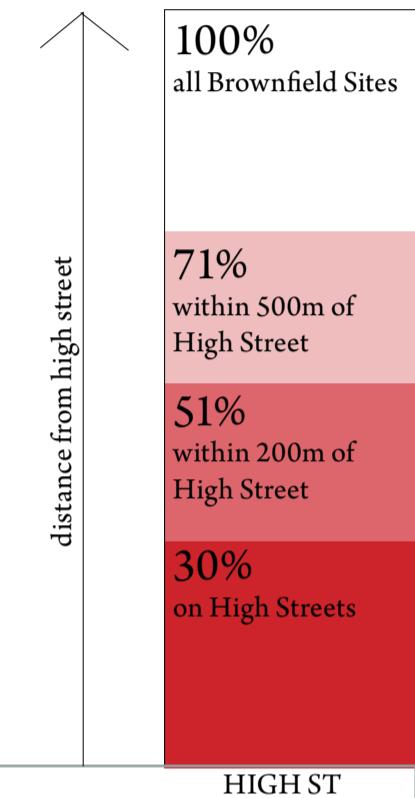


Chart: Number of Brownfield Sites

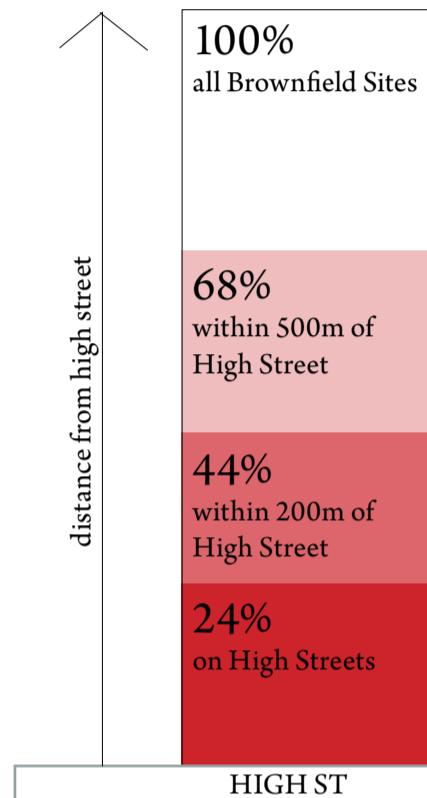


Chart: Area of Brownfield Sites

3.4.3 A strategic development potential

This potential of high streets as foci for future development is clearly demonstrated when development sites are mapped across London and correlated with high street locations. The exercise demonstrates that almost a third of London's brownfield sites are on high streets, and a half are wholly or partially within 200 meters of a high street (three quarters within 500 metres). When converted to land area, a quarter of the available land in brownfield sites is on high streets, and approaching a half is within 200 meters (two thirds within 500 metres). When small windfall sites, underutilised buildings and sites, and vacant spaces over shops are taken into account, the development potential of high streets is likely to be even higher.

see 'Brownfields Site and SHLAA site' charts (left)

>50% **Of brown field sites are within 200m of a high street**

When repeated for London's larger Strategic Housing Land Availability Assessment (SHLAA) sites only, a similar picture is revealed, with in excess of a third of larger SHLAA sites (over 0.25 hectares) sitting on high streets, and well in excess of half (both in number of sites and potential number of units) within 200 meters (three quarters within 500 metres). These sites, when compared to others in more isolated locations, are likely to benefit from the established infrastructure – physical, economic, civic and social – that characterise high streets; infrastructure that will not need to be provided afresh (see 3.7.2). High streets across the capital clearly have a strategic importance and potential for growth that belies the seemingly local nature of many such locations.

see 'Brownfields Site and SHLAA site' map (right)

This implies that of the total 2,630 hectares of developable brownfield land across London, about a half is within a two and a half minute walk of a high street (three quarters within six minutes), with the potential both to benefit from the services already offered there, but also to enhance them through the multiplier effects of increased population and the consumers that new development will bring. It also implies that the quality of local high streets is likely to represent a major incentive or disincentive to many of these sites being developed.

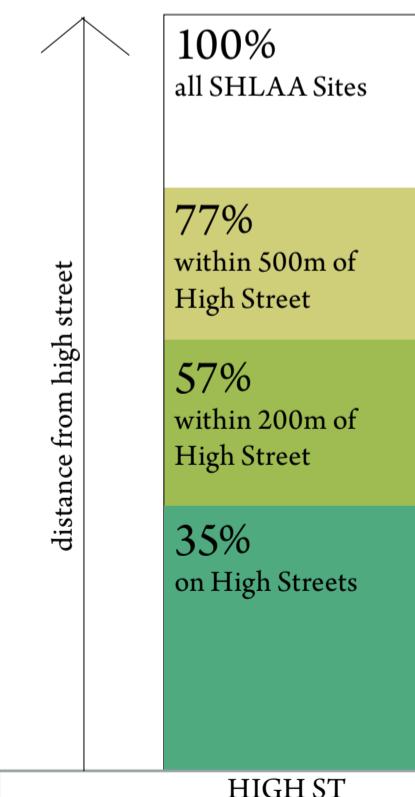


Chart: Number of Larger SHLAA Sites

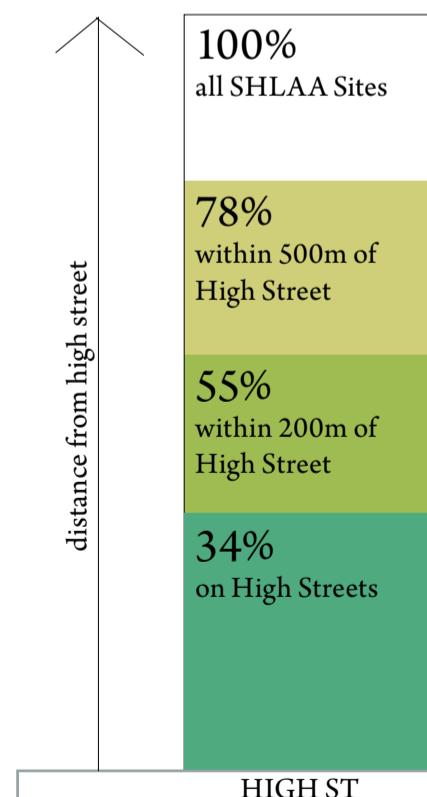
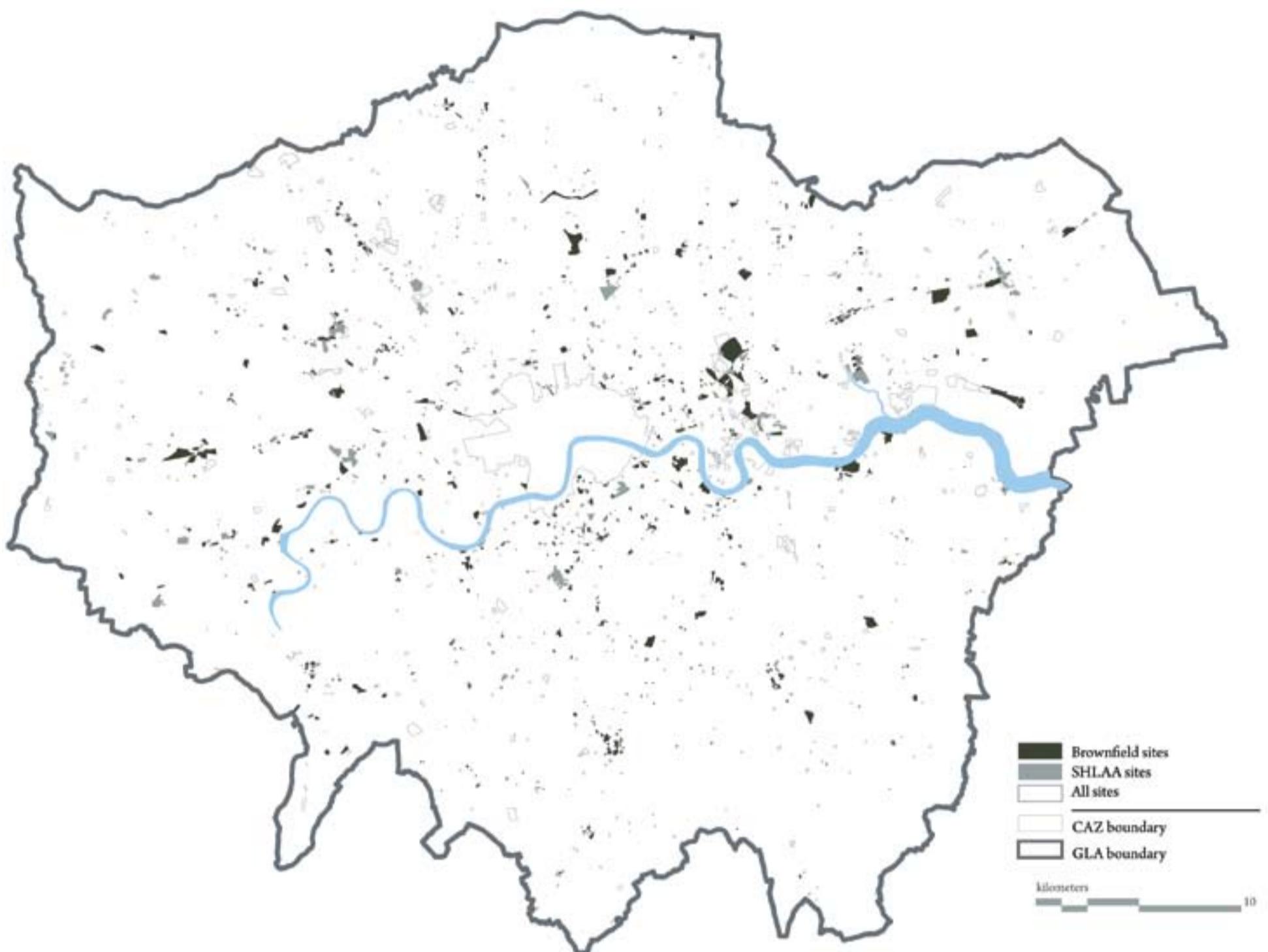


Chart: Number of Units on Larger SHLAA Sites



Map: Brownfield sites and SHLAA sites within 200m of high streets
(LDA and GLA databases)

3.5 Exchange

3.5.1 Spaces to be

The potential of high streets as exchange spaces will depend on the range of activities they cater for, whilst their success will depend on the concentration of users within their catchment, and the perceptions of those users, once there. Taking the latter first, as well as overall perceptions about quality (see 3.7.1), how safe users feel on high streets will be critical to their willingness to spend time there (see 2.3.2 above).

You are **68%** safer in a mixed-use busy street than you are elsewhere in London

In their analysis of five years of police crime data across one London Borough, Hillier and Sahbaz (2009: 181-182) confounded widely held perceptions of London's crime-ridden high streets, proving instead that users are 68% safer in busier mixed-use streets than in single use quieter locations. With one important exception, their analysis showed that "it is not the high street where the danger lies, but instead in the much less significant segments close to the high street"; in other words in and around the quieter hinterland of high streets. The exception is after midnight when activity on the high street reduces considerably and street robbery makes a return to these spaces. The analysis demonstrated a need to address the sudden decline in vitality in London's high street's tributaries, rather than necessarily any need to address crime concerns on high streets themselves (except after midnight).

Despite these findings, high streets often show up on police records as hot spots of crime; in Hillier and Sahbaz's (2009: 182) research, for example, exhibiting 2.4 times higher rates of street robbery than other London streets. The answer, it seems, relates to their intensity of use, leading to high overall incidents of crime. But, because high streets accommodate very high levels of activity, the rate of crime per user is considerably lower than in quieter single-use locations. Proportionally, therefore, they are far safer places to be. The analysis helps to justify public sector initiatives to retain vitality on high streets and make them pleasant places to be, whilst increasing the concentration of potential users on and in the immediate vicinity of high streets will raise numbers using surrounding streets, and help to combat crime and fear of crime.

3.5.2 Working and living on high streets

As well as recognising the opportunity to increase exchange potential by attracting new development to high street locations (as argued in 3.3 above), it will be equally important to recognise the needs and potential of the huge working and living populations already on and around London's high streets. It is first and foremost for these users that significant quality of life benefits stand to be delivered if high streets thrive.

A graphic representation of the role of London's high streets in supporting jobs was provided in the Design for London Urban Design Scholarship work undertaken by Fiona Scott which mapped the non-residential uses in a 51Km stretch of road across London from Romford to Uxbridge. By walking the length and recording building uses and estimating employee numbers, a rough estimate of 6460 businesses and 79,425 jobs was made; equivalent to the working population of Canary Wharf in 2009.

see map (overleaf).

When employment is mapped across London in relation to the high street segments identified in 3.3.2 (above) some equally dramatic results are revealed. The analysis reveals that just over a third of London's employees are employed on or within 200 meters of a high street, a number in excess of employees working in London's Central Activities Area (CAZ) at just less than a third of the city's workforce.

These employees are employed by approximately 43% of London's workplaces (as opposed to the 23% in the CAZ), suggesting that many are small, local firms, likely to employ local workers, supporting the arguments made in 1.1.6 (above) concerning the important role of high streets as drivers of entrepreneurship. Outside the CAZ, in excess of half of employees are employed on or within 200 meters of a high street, amounting to some 1.45 million employees, and exceeding the 1.39 million employed in the CAZ. Mapping retail and offices uses across London demonstrates the strong association between the patterns of these major London employment categories and that of the high street segments already identified.

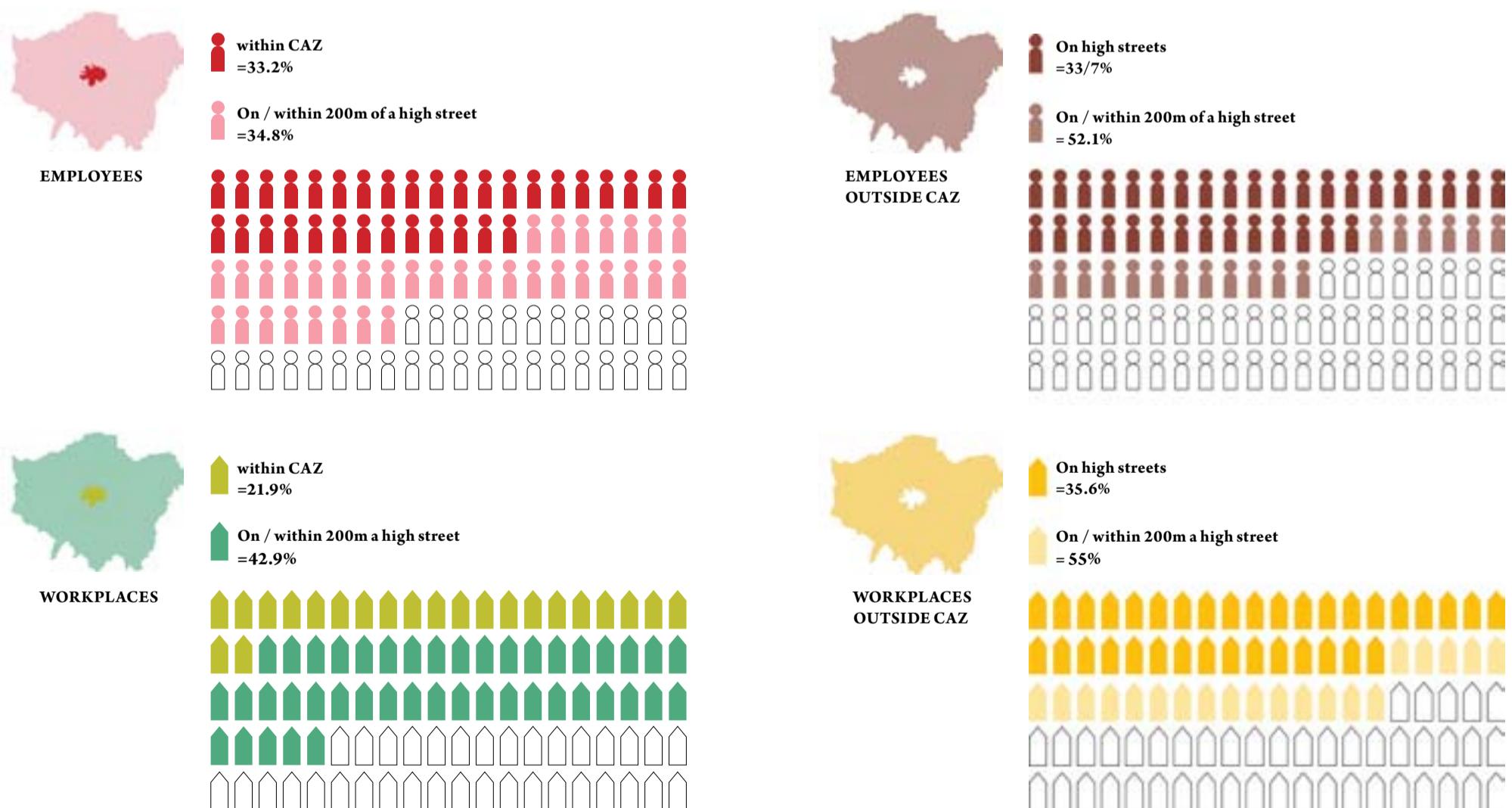
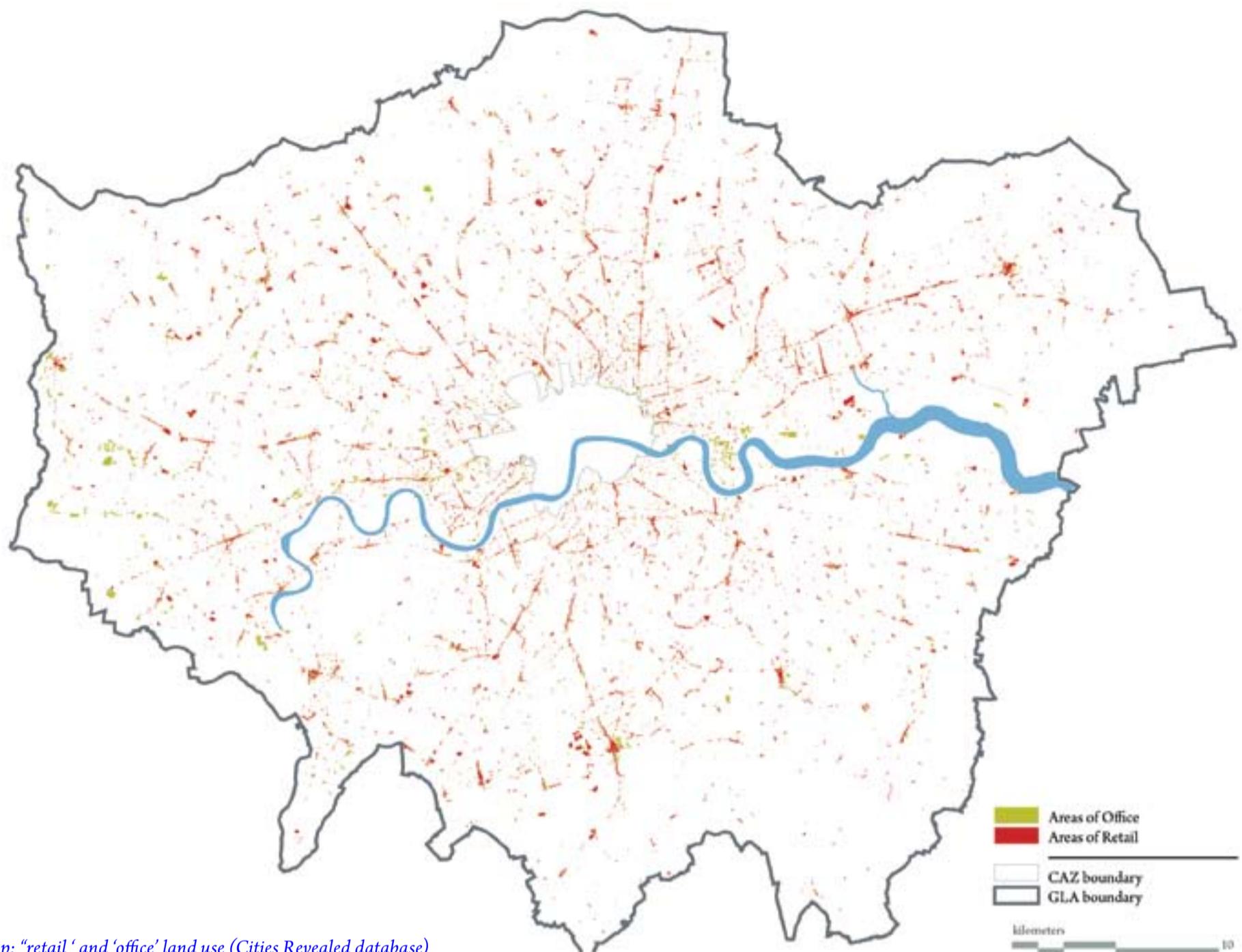
see map (right)

>50% More than half of London's employees (outside of the CAZ) work within 200m of a high street

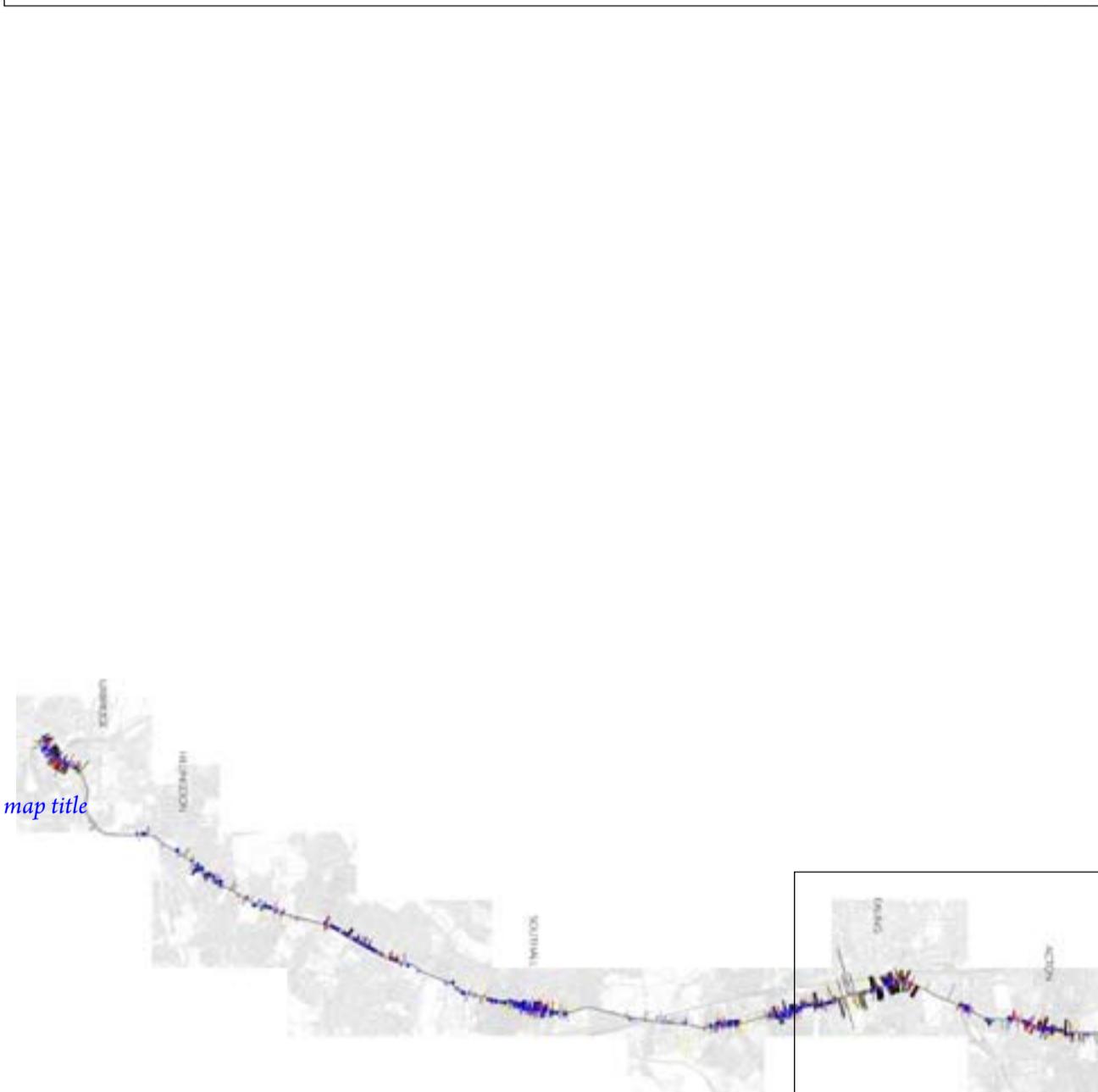
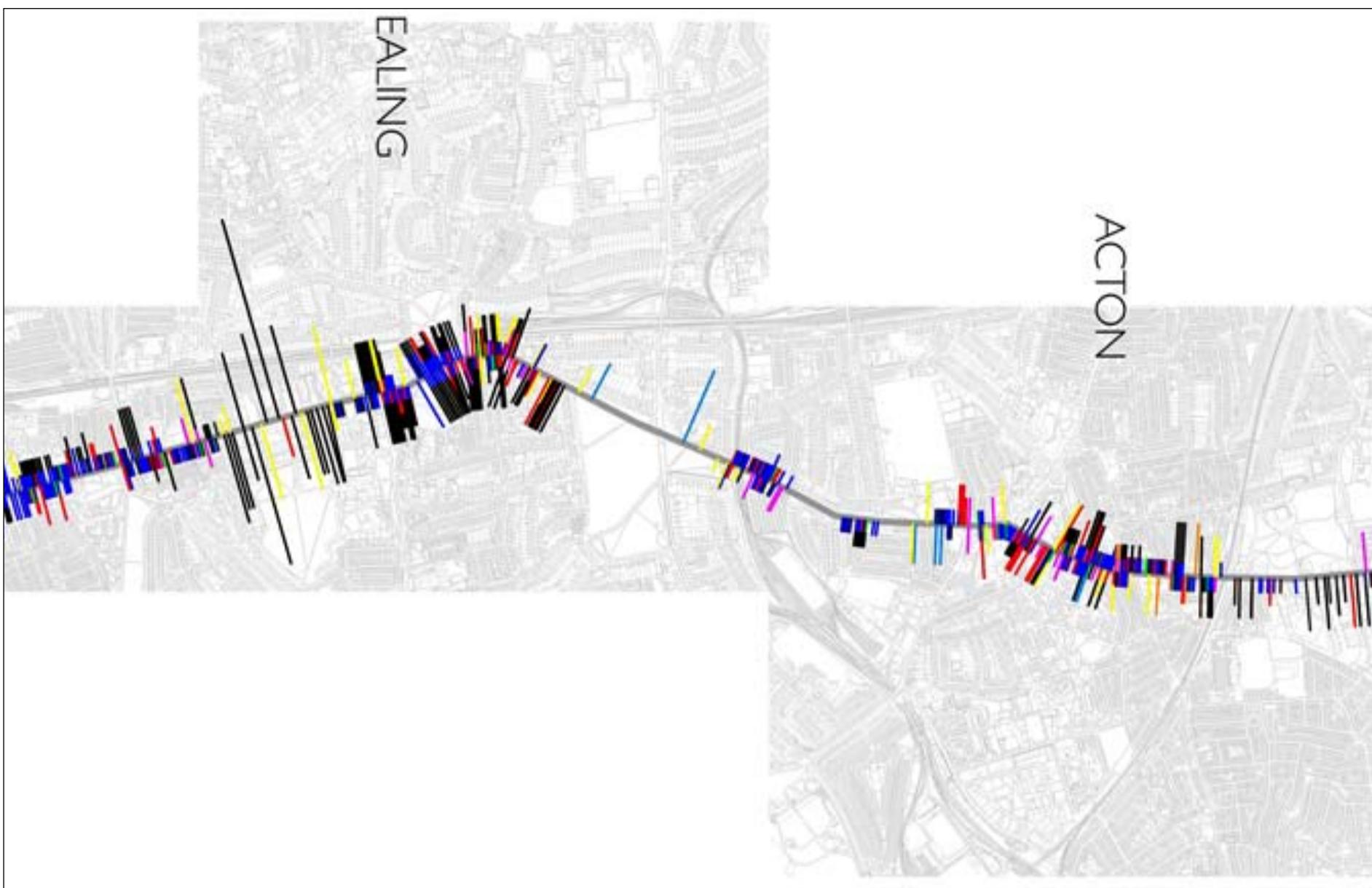
Correlating residential population to the high street segments (identified in 4.2.2) is similarly revealing, with both 2001 Census data and 2008 mid-year population estimates suggesting that approximately 10% of all Londoners (three quarters of a million inhabitants) live on or immediately next to its high streets, 40% (3 million) within 200 meters (or a two and a half minute walk) and around two thirds of Londoners (5 million) within 400 meters (five minutes).

40% of Londoners (outside of the CAZ) live within 200m of a high street

The analysis demonstrates the vital importance of high streets as existing locations for business and London's residential population, implying both a vital economic role in supporting the former, and a central position in the perceptions held by the latter of London as a place to live (see 1.1.6). It seems that London's high streets are an inescapable reality of everyday life for the majority of the city's inhabitants, either as workers or residents, and that unless reversed, the neglect (see 3.7) that many such spaces have suffered will continue to play poorly amongst those populations.



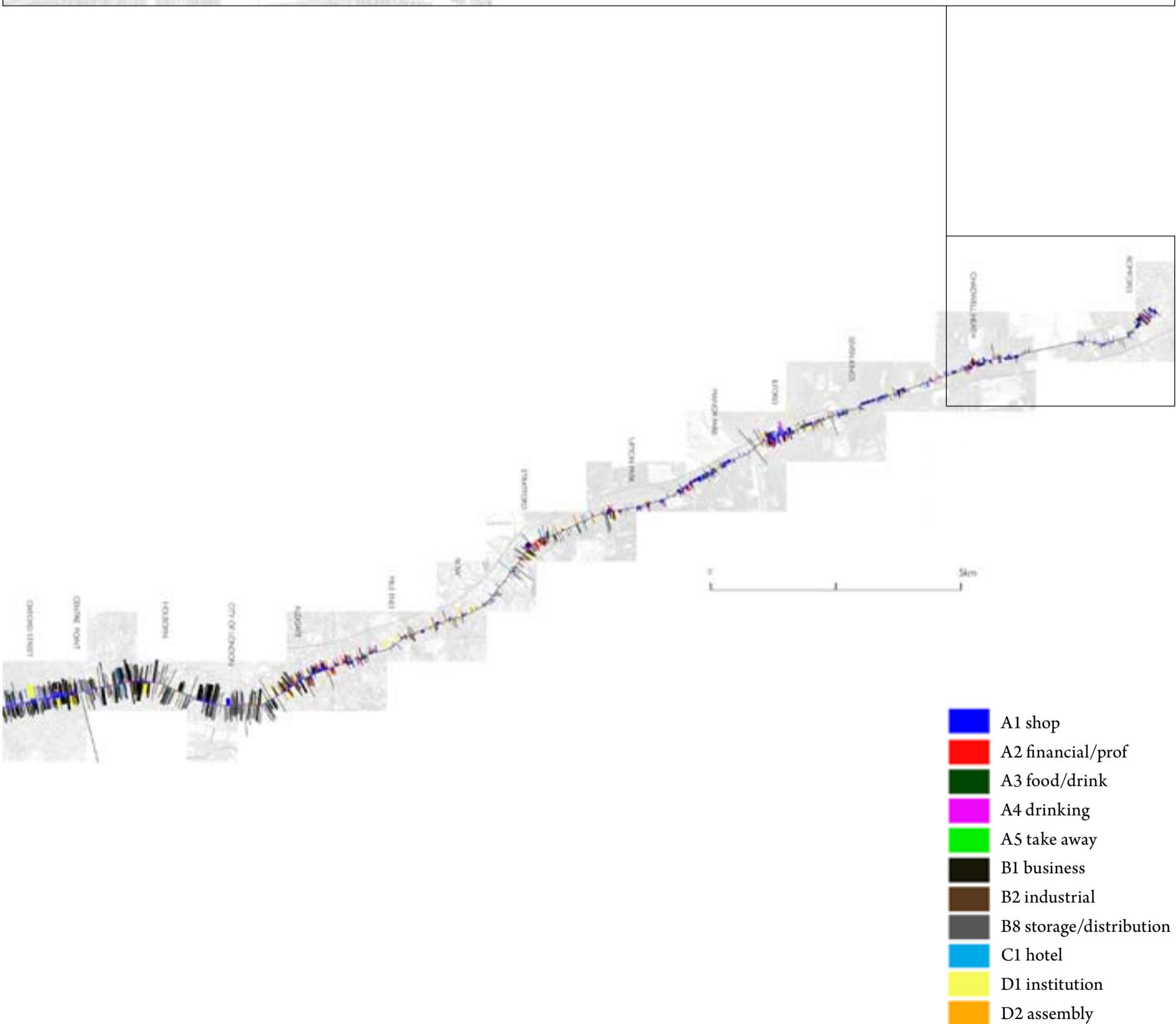
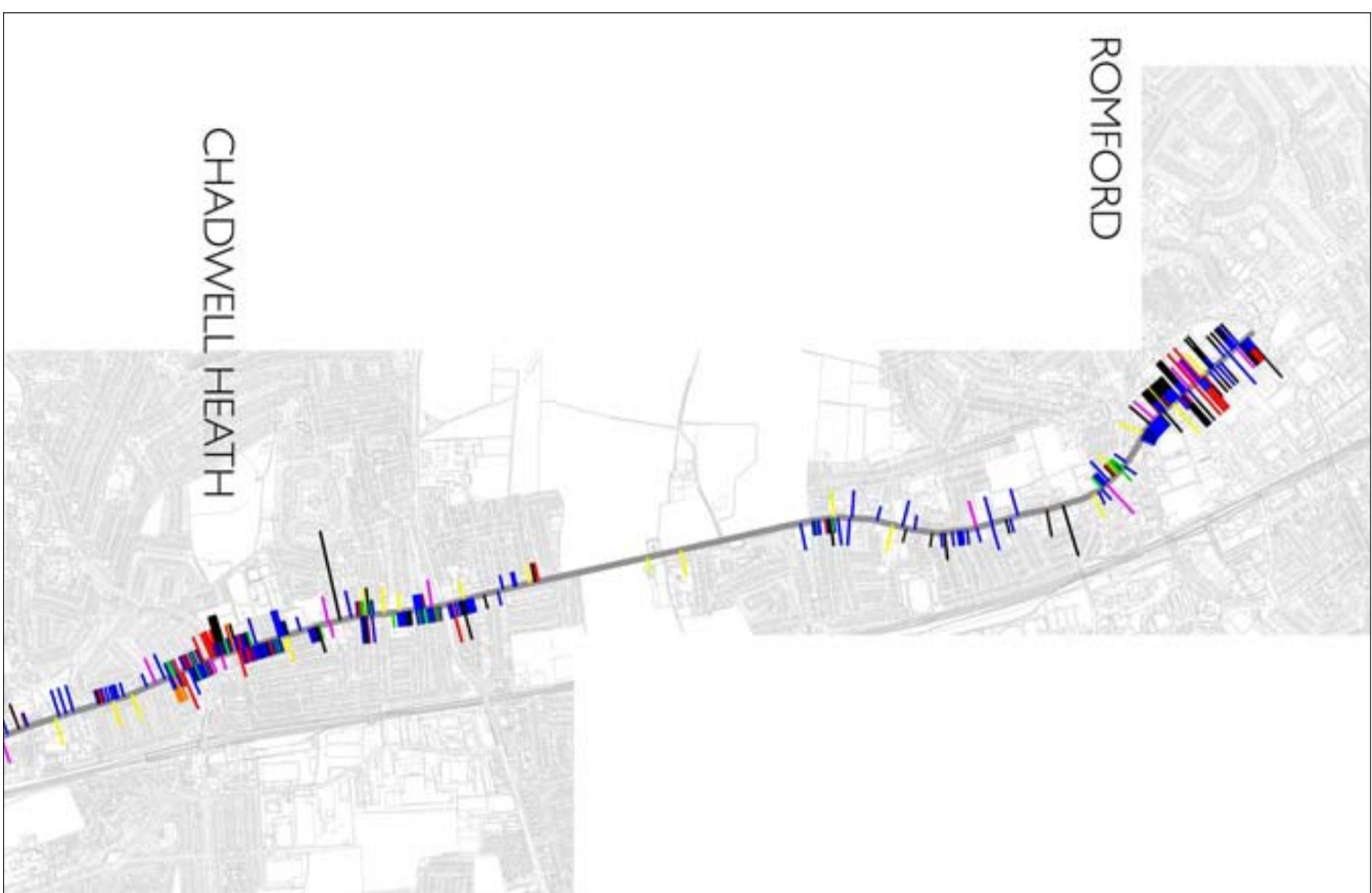
Tables: distribution of employment and workplaces in London



Length of Road: 51km
Observed number of businesses: 6460
Estimated no. employees: 80,000

Drawings: observed non-residential land use along continuous High Street between Uxbridge and Romford, at each building storey (from "Uxbridge to Romford, A London High Road, DfLUrban design scholarship by Fiona Scott 2009)

SR
01
02
03
What is the nature of London's High Streets today?
04
05
REF
AP



3.5.3 Beyond retail

Not all of London's town centres have been affected equally by the trends described in 3.4.1 (above). Central London and the larger town centres are the main beneficiaries of the recent growth, with the smaller centres continuing to suffer. Barnet, Dagenham, Edgware and West Ealing, for example, are all amongst the UK's top 20 high streets with the biggest rise in voids during 2009 (Cooper 2009). This continues trends that have been in place since 1971, a period that has seen a decline of 50% in retail jobs in

50% DECLINE in retail jobs is in London's smaller town centres.

some of London's town centres (GLA Economics 2006: 48). GLA Economics suggest that this may be particularly pronounced in centres close to some of the capitals mega retail developments at Stratford and White City, although others will also continue to fail to adapt to changing consumer demands over time. This implies that for some of London's high streets, a future that looks beyond retail as the core of their existence may be a sensible path to follow in the future, for example the much publicised scheme to convert derelict shops to artist studios and galleries (Moorhead 2009). In a context where two thirds of trips to high streets are not for retail purposes, such alternative strategies may be inevitable (see 4.4.3).

Although not looking specifically at London, the recent Retail Think Tank (2009) White Paper on the future of retailing agrees that the current problem of vacancies on many suburban and non-prime high streets is not in the main a consequence of the economic downturn, but instead a symptom of structural change with far deeper roots that will require more radical action, including wholesale re-zoning of some high streets away from retail; in some cases back to their original residential uses. Elsewhere, they argue, much greater and more proactive public sector intervention is required to ensure that more high streets do not fall into this category.

Such decisions will need to be driven by an analysis of the local catchment, its nature and needs; the local competition high streets face; their relative convenience for shoppers; the character of the local environment offered; and the consequential choice they can provide for consumers (Carmona 2008). Some headline figures demonstrate how investment in London's high streets could transform the social, economic and environmental experience of living in London.

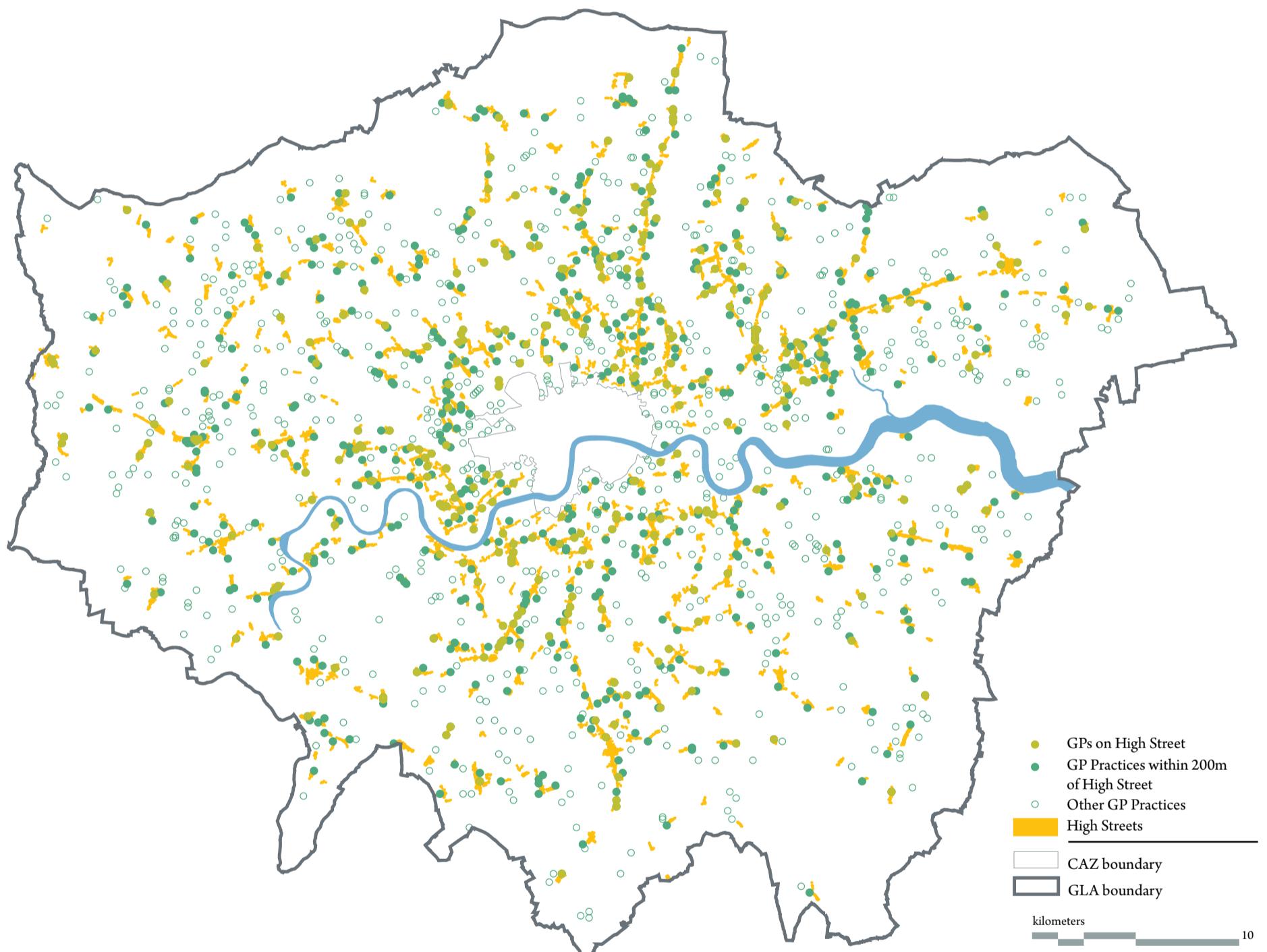
People who walk in London spend on average 1.5 times more in a locality than those who arrive by car

- A survey by Living Streets (2002) of elderly residents in London revealed that a quarter of respondents complained that basic shops and services were now further away.
- Traditional pubs in London have been closing at a rapid pace, 11 a week according to evidence collected by the British Beer and Pub Association (Urwin 2009a).
- Only 21% of trips in London are taken on foot (Transport for London 2007a) and in Outer London over half are taken by car (Transport for London 2007b).
- People who walk in London spend on average 1.5 times more in a locality than those who arrive by car (Transport for London 2004; Living Streets 2006).

The literature (see section 2.2.1) suggested that high streets have traditionally been associated with a wide range of civic and community functions, as well as with retail or other commercial and residential uses; but also that these uses have been in decline, suffering, for example, from consolidation and relocation

away from high street locations. Taking just one such use for which data is readily available – the location of GP practices – the evidence suggests that only a fifth (approximately 300) of GP practices are still located on the high street which once would have been the logical locational choice. However, in excess of a half (approximately 800) are located still within 200 metres. The analysis confirms that even in a context of consolidation and the movement of such functions into larger units with parking and other amenities, high streets or their vicinity are still preferred locations for many such uses, correlating to the high concentrations of potential uses at these locations (see above) and to their high accessibility (see 3.6 below). A wide range of public and pseudo-public agencies and authorities will be responsible for decision-making around such civic and community functions, many of whom will not have the health of the high street as a key objective, but whom would nevertheless be negatively impacted by its demise (e.g. the health impacts of reduced walking). Understanding and disseminating these relationships and associated responsibilities is a key public sector role, not least of the new spatial planning system.

refer to map (right)



Map: location of GP surgeries in relation to high streets
(TfL database)

3.6 Movement

3.6.1 Connectivity

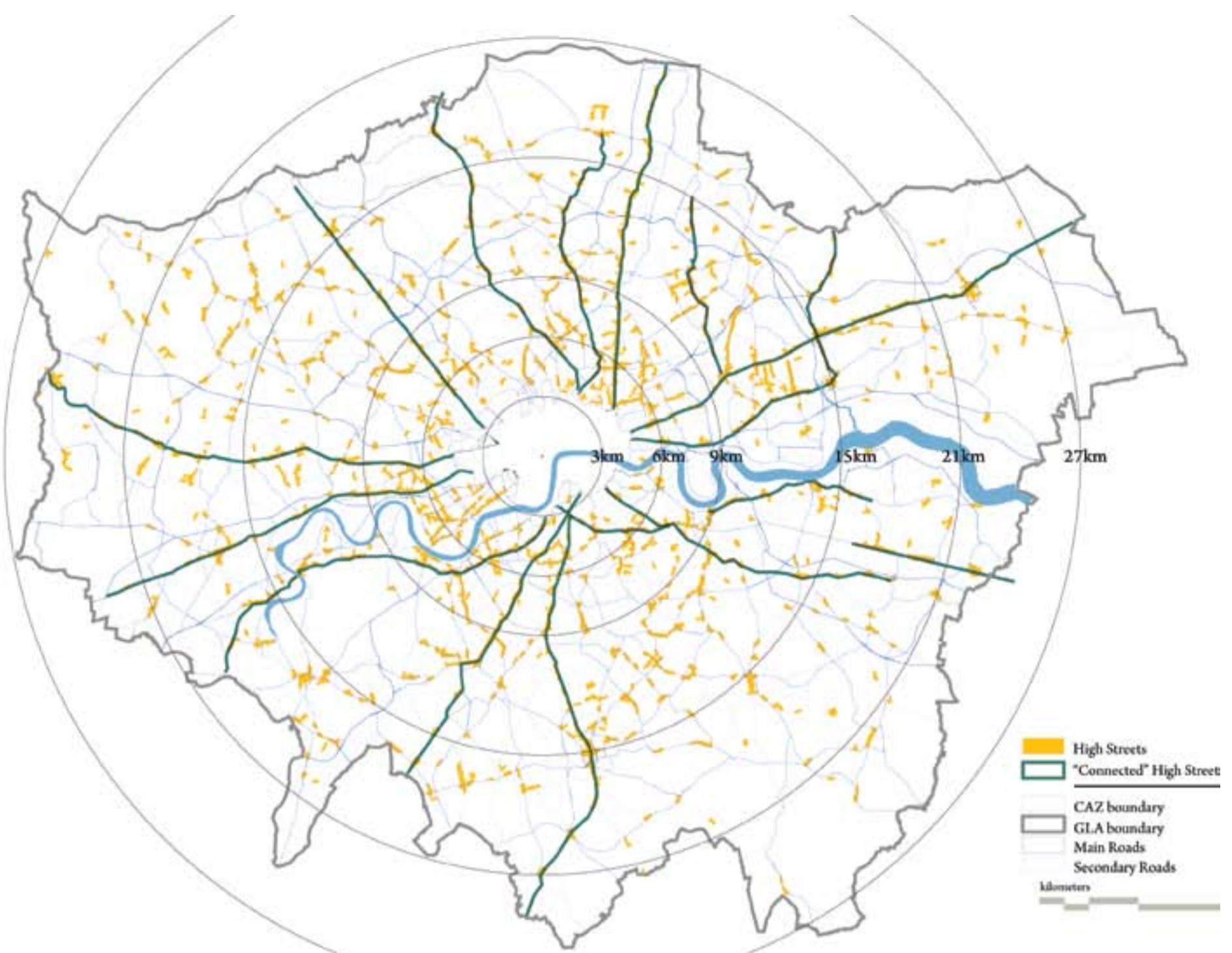
A critical characteristic of high streets is their connection to the surrounding movement network (see 1.2) in physical terms and as regards the public transport infrastructure. Maps already presented in 3.3.2 (above) demonstrate how many of London's high streets are well integrated with their surrounding street network, often strung along continuous or almost continuous radial and concentric routes through London. The most continuous of these can easily be picked out as chains of high street activity going many miles through the capital.

see map (top right)

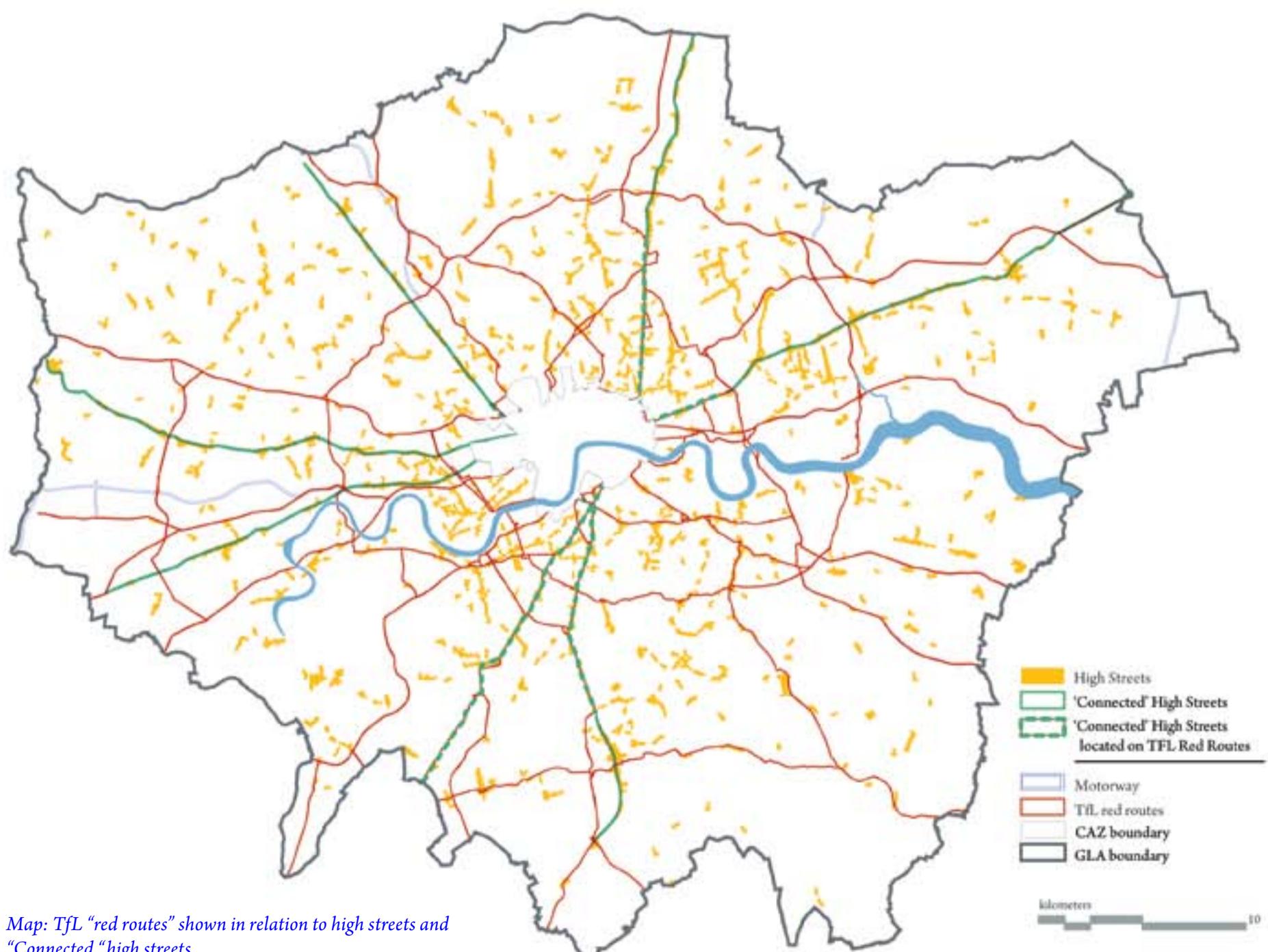
Contrasting these routes with London's most heavily trafficked Transport for London Road Network (TLRN) or 'Red Routes' reveals that although the two sometimes coincide, often they do not as new trunk roads have been built around many of London's town centres in order to get traffic more quickly into Central London and to relieve congestion along the traditional high street routes. The A4 in west London is such a case which bypasses the A315 through Hammersmith, Chiswick, Brentford, Isleworth, and Hounslow. However, as the TLRN network has become progressively overloaded, so to are the traditional high street routes, with, for example, the Evening Standard identifying the A315 (and Chiswick High Road in particular) as one of the capitals ten worst traffic back spots (Williams 2005). In such circumstances, high streets are being heavily used by large volumes of traffic simply passing through, rather than by local traffic with a greater propensity to stop and yield economic benefits on the high street.

see map (bottom right)

Most high streets are by-passed by larger trunk roads



Map: "Connected" high streets in London



Map: TfL "red routes" shown in relation to high streets and "Connected" high streets

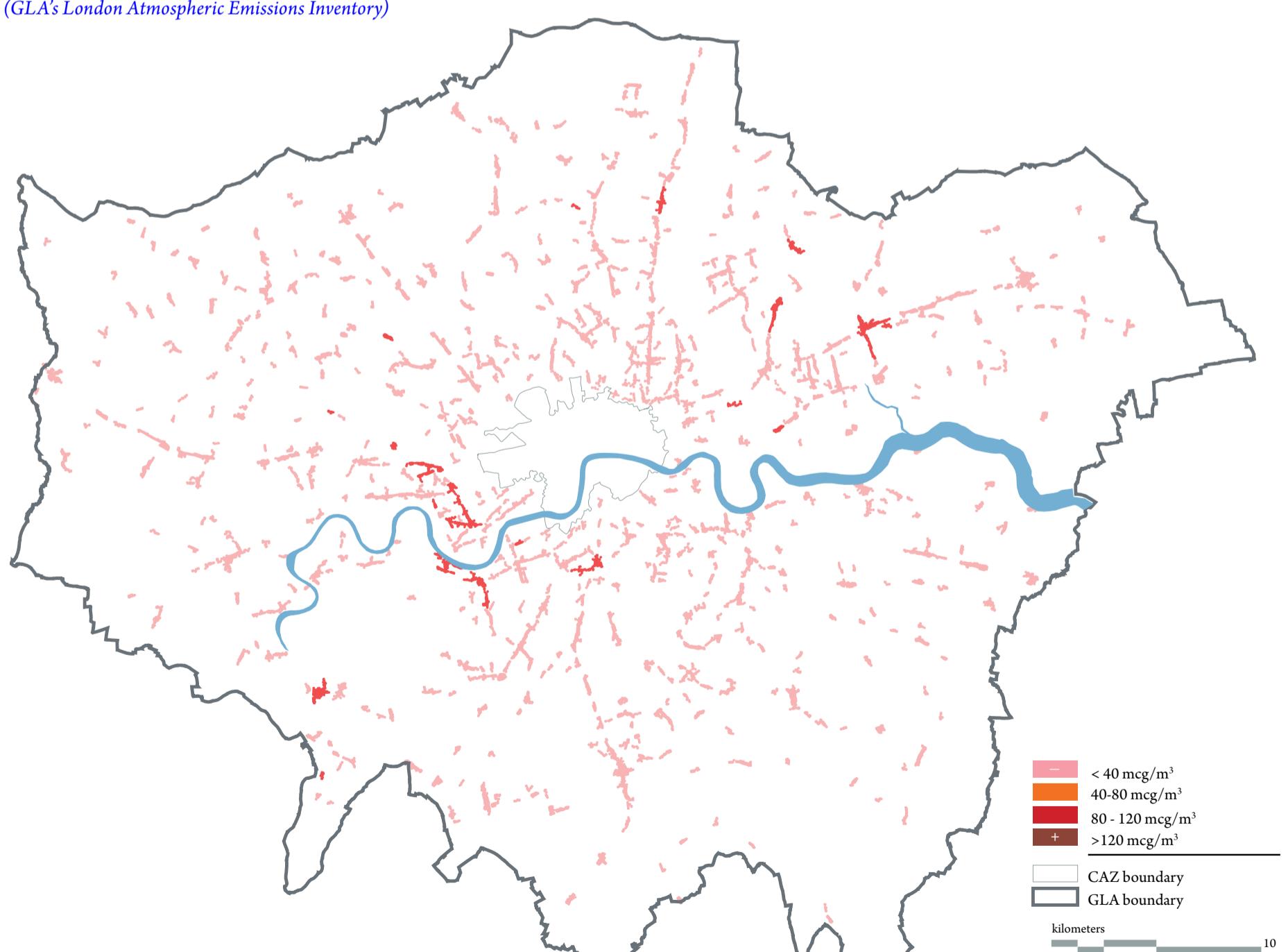
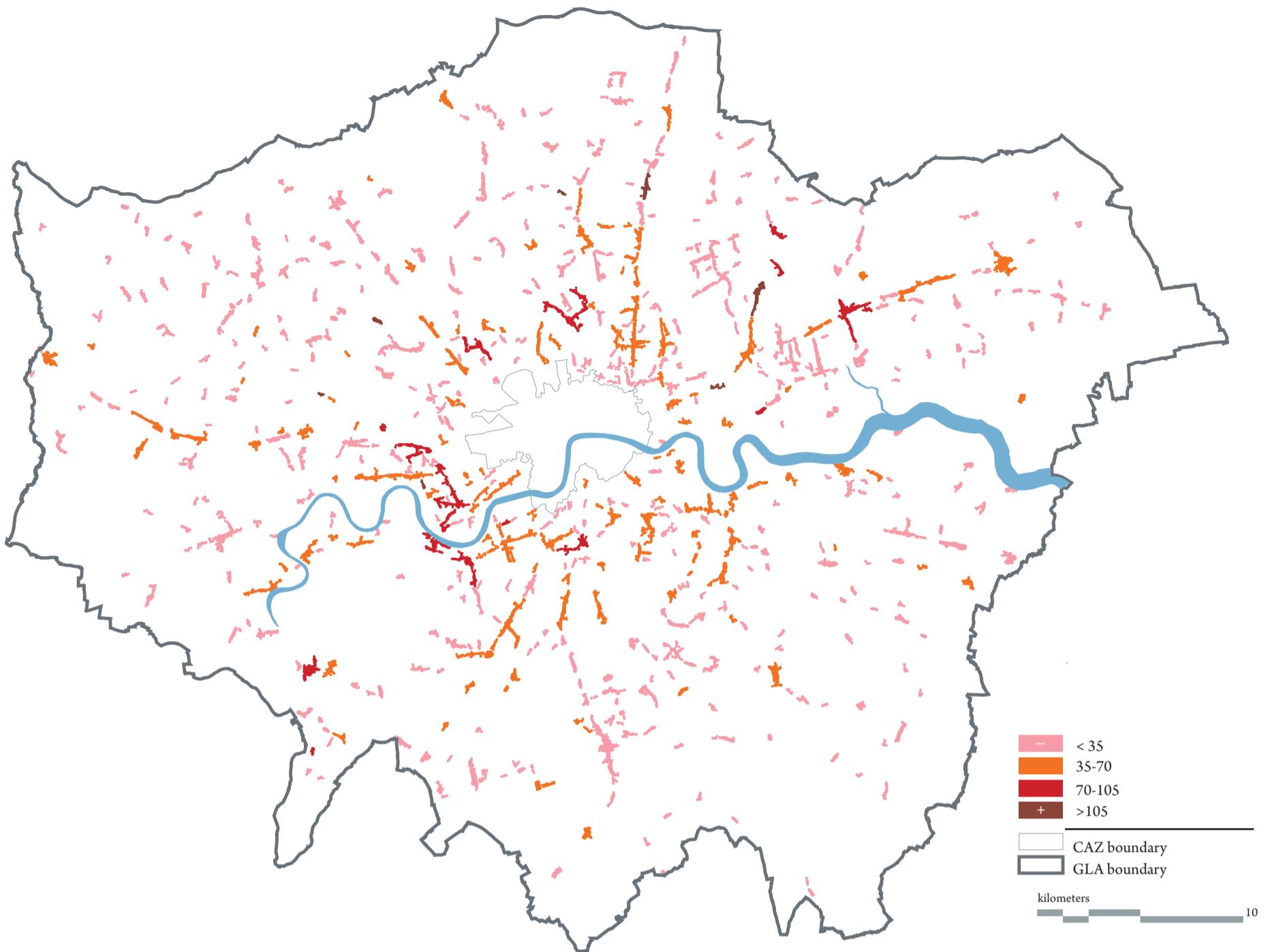
3.6.2 Pollution

The knock-on impact of such high traffic loads on London's high streets is demonstrated through an analysis of pollution levels which are modelled in London to a very fine scale of 20 meters. Two concerns are important here. First, the level of Nitrogen Oxide (NO₂) and second that for particulates of up to 10 micrometres (PM10). For both, levels should not exceed the UK Air Quality Objective of a maximum annual mean of 40 micrograms per cubic metre. In addition, for PM10, levels should not exceed 50 micrograms per cubic metre for more than 35 days a year. Mapping of these pollution signifiers against the London high street lengths already identified shows that almost all of London's high streets have concentrations of NO₂ above the objective level, and frequently two times and sometimes three times the level, for example Wandsworth and Brixton in South London.

see map (top right)

Fewer high streets transgress the PM10 level, perhaps demonstrating one of the benefits of a partially separate TLRN network to which larger goods vehicles (particularly problematic in this regard) are more likely to stick. Exceptions include Hammersmith, Edmonton, and a few others. These in common with many of London's high streets also record levels of PM10 that far exceed the maximum number of days in excess of the particulate threshold; in Leytonstone and one or two others in excess of 105 days (or three times the recommended amount). In these places, the high street and TLRN networks coincide, raising pollution levels far beyond UK recommended amounts, and demonstrating a critical threat to London's high streets as traffic levels continue to rise.

A silver lining is provided by the data which also shows how quickly concentrations drop off away from high street locations.



3.6.3 Accessibility

A more positive picture is provided when high streets are compared to London's public transport network. Simply mapping London's high streets against the tube and rail network, for example, reveals that many of the identified high street lengths have a tube or rail station, whilst only 30% (81 out of 268) of London's tube stations are off a high street location.

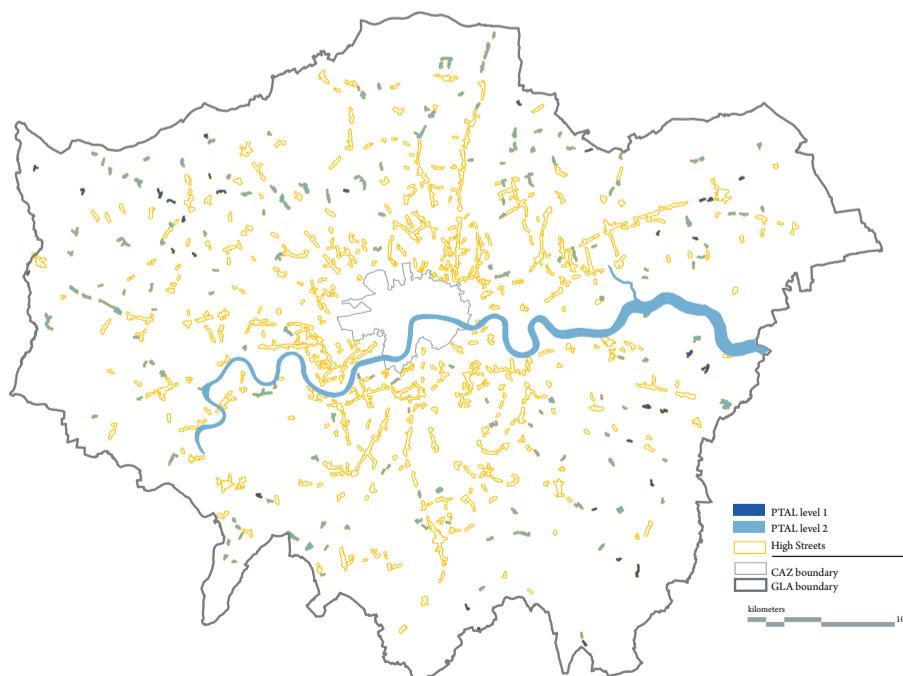
[see map \(top right\)](#)

It is also possible to compare Transport for London's Public Transport Accessibility Index scores with the identified high streets. This exercise reveals the accessibility of high streets to all forms of public transport (rail, tube, bus and tram) on a scale from 1 (very poor access to public transport) to 6 (very good access). The analysis shows that outside the CAZ about a fifth of high streets have the very best public transport access, and that in the main these relate to London's major town centres such as Kingston upon Thames or Romford, or routes along some of the major connected high streets through Inner London, including the A10 corridor (Kingsland, Dalston, Stoke Newington). Only a tiny proportion (5%) of high streets have a very poor accessibility rating of 1, and about a quarter score 2, indicating poor accessibility. The bias in these categories (although not exclusively) is to Outer London and to smaller 'detached' high streets, although some parts of London's continuous connected high street ribbons fall into this category, including, for example, northern segments of the A10 / A1010 (Ermine Street) corridor, or Hillingdon, west of London.

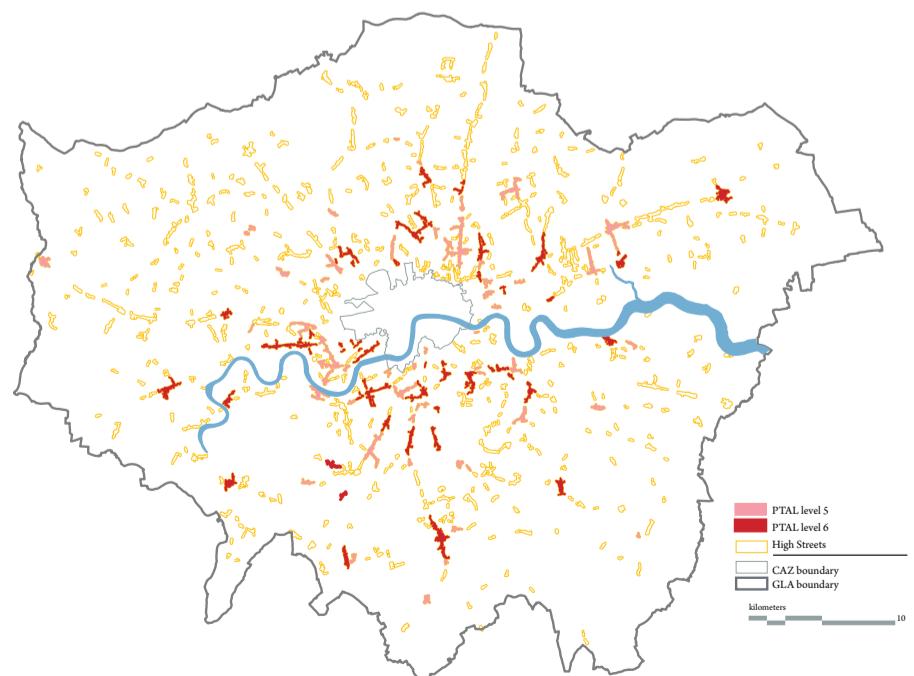
[see map \(below\)](#)

Perhaps most interesting are high streets in categories 4 and 3 which together account for just over half of London's high streets. These are well distributed across London and already have moderate to good access to public transport and, typically, a sizable existing concentration of mixed use high street uses. They nevertheless offer considerable potential for improved public transport accessibility as a means to further bolster their development potential in a sustainable fashion, and potentially to reduce pollution also. Examples include Bexleyheath (PTAL 4) in South-east London or Southall (PTAL 3) in West London.

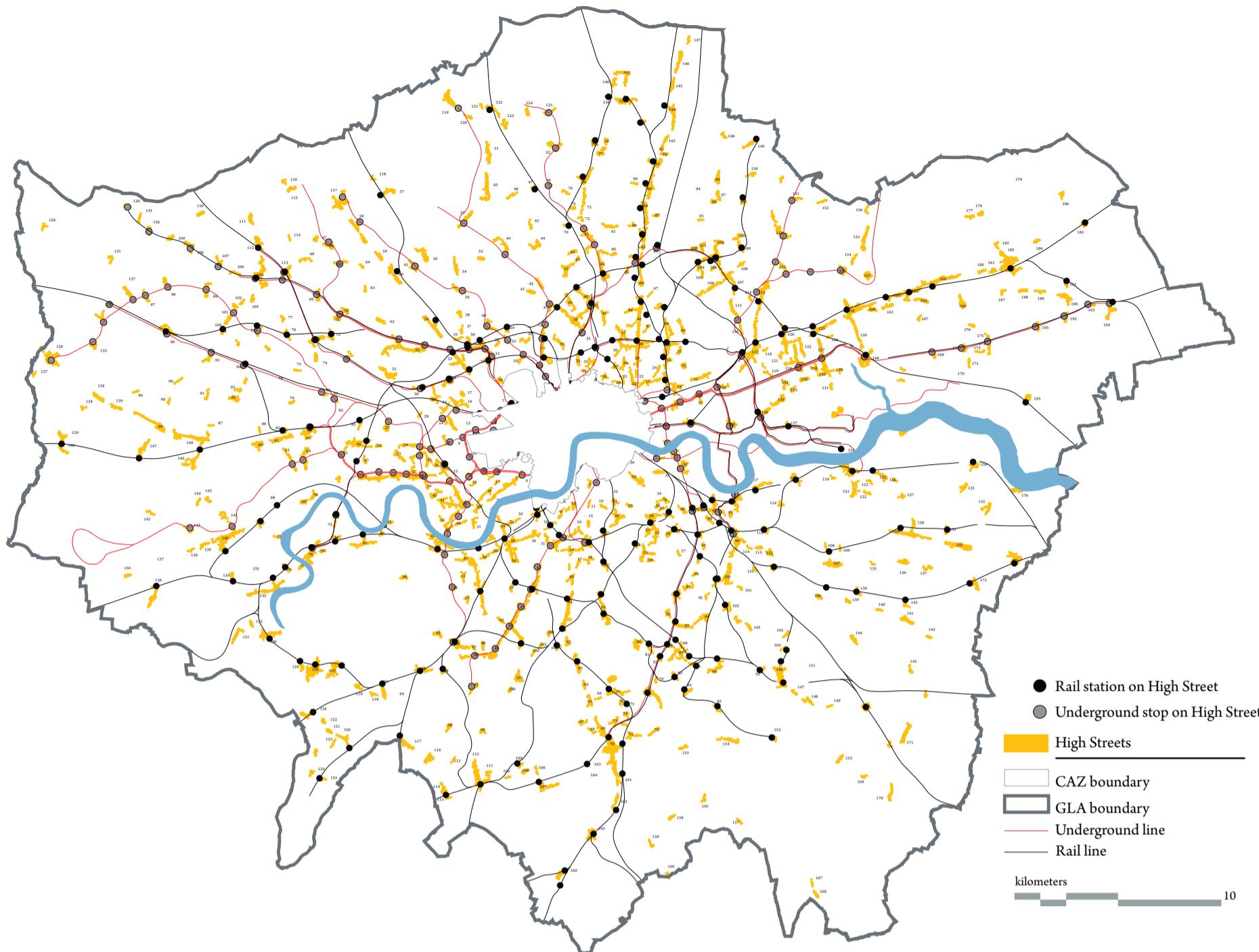
[see map \(bottom right\)](#)



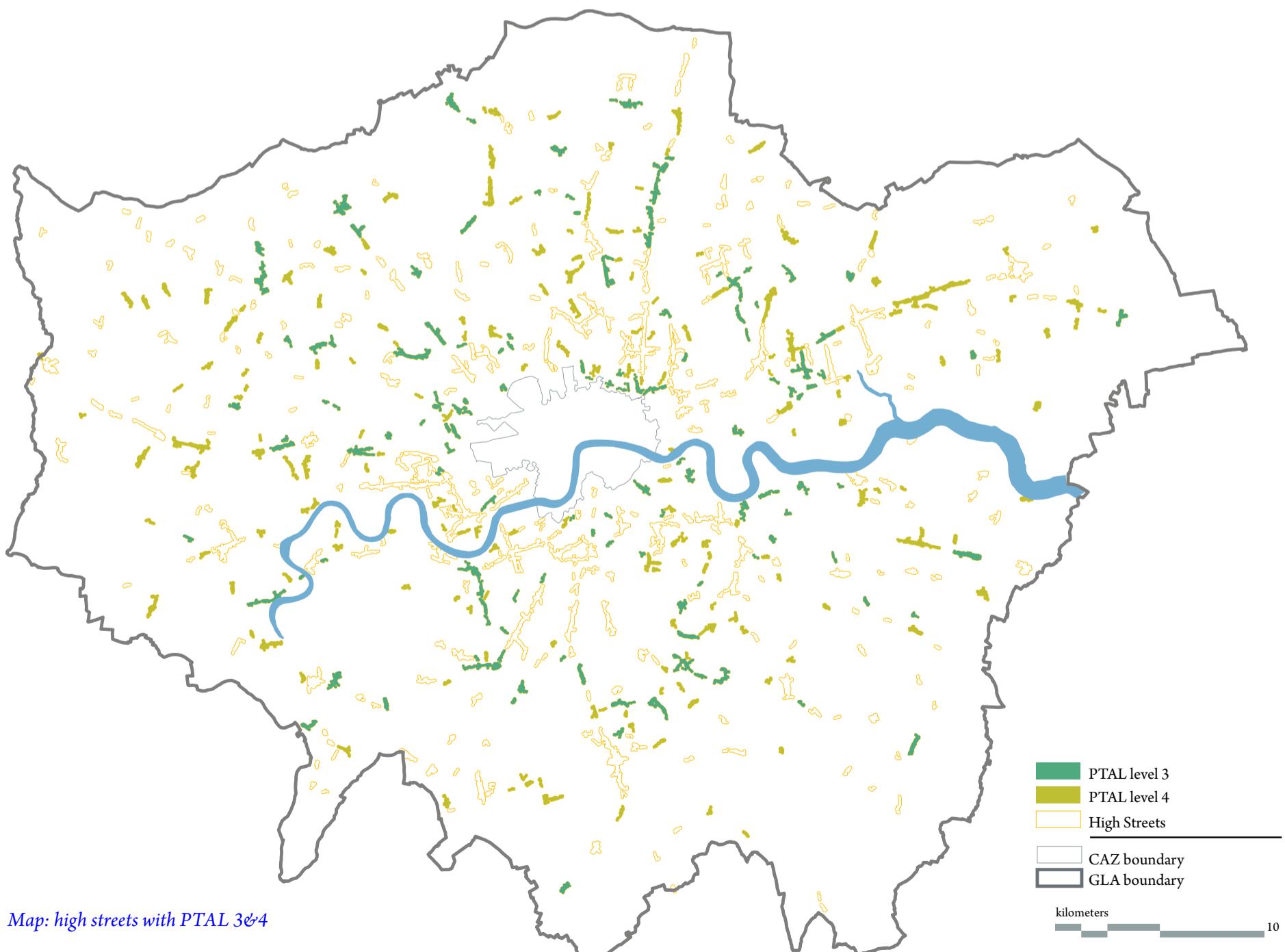
Map: high streets with PTAL 1&2



Map: high streets with PTAL 5&6



Tube and rail stations against high streets



Map: high streets with PTAL 3&4

3.7 Management

3.7.1 A mixed picture

Despite their location at key strategic points throughout the city, many of London's high streets have a somewhat unplanned, even neglected, character. Many have largely been left to fend for themselves, with hugely varying results (compare, for example, two local high streets in Battersea and Erith, respectively Northcote Road and Pier Road). By contrast, some have suffered from intervention overload (e.g. Lewisham High Street), whilst others have been successfully reclaimed through careful and coordinated intervention (e.g. Kensington High Street). Some have thrived whilst others are shadows of what they once were.

In general, however, the landmark report from Gehl Architects (2004) on the state of Central London's urban environment revealed that the city has not been looking after many of its streets well. The consultants highlight the need to create a better balance between vehicular traffic, pedestrians and cyclists, chiefly by improving conditions for pedestrians and cyclists, upgrading the visual quality of London's streetscape, and establishing a more people-centred city in which users are happy to simply pass the time of day. For them, the pedestrian environment of Central London is often over-crowded, cluttered, uncomfortable, and devoid of the elderly or young. In such an environment people walk because they have to, and not because the city is an enjoyable place to experience on foot.

96% of Londoners think their local high street can be improved.

Gehl Architects (2004: 110) identified a series of predominantly physical interventions to address the problems, combining: greening the city through planting; cleaning up the streetscape; introducing an urban lighting strategy; improving management and maintenance; and ensuring that all new buildings make a positive contribution at ground floor level to the street scene. Yet judging by more recent evidence gathered by Open House (2009), solutions to the long-term neglect of London's high streets will need to be wider ranging. Their survey of (predominantly) Londoners (84%) revealed that 96% of respondents felt that the design of their local high street could be improved in ways that transcend the categories identified in section 3.0 (above):

- 1. Physical fabric:**
poor shopfronts, signage, pavements, public art, street furniture, lighting, greening; too much clutter; undermining character, heritage and context
- 2. Real estate:**
poor retail mix; over-dominance of chains; presence of derelict units
- 3. Exchange:**
poor range of community facilities
- 4. Movement:**
poor quality parking, cycling space and facilities; lack of concern for pedestrian safety
- 5. Management:**
low attention to cleaning and maintenance; poor traffic management

In their Tooting case study, Jones et al (2007a: 3) revealed the difficulties in dealing with a problem that goes to the heart of many of the issues identified in the Open House (2009) survey: balancing space between street users; in this instance between traffic, buses and pedestrians. In Tooting, the presence of 'pinch points' along the street means that pedestrians often have to walk in the road when the pavement becomes too crowded, with over half of those

surveyed by Jones et al recognising this to be a problem. Because of the lack of adequate bus lanes or pull-in spaces along the street, buses are often delayed by pedestrians, general levels of traffic and by other buses. The result is frustrated pedestrians and bus users, with accidents concentrated around bus stops as pedestrians try to cross in front of buses without due regard to their safety.

In such a case, the complex and opposing functions that the high street is attempting to cater for requires that decisions are made about which functions get priority, and how to design that priority in to any given local context. In general, Jones et al (2007b: 74) reveal that the negative impact of traffic on the use of high streets by other users is consistently the most significant problem identified in their research. The other studies discussed in this section (above) seem to confirm that finding, but also a tension with no simple solution.



Battersea
Lewisham

Erith
Kensington

3.7.2 The case (and responsibilities) for investment

In London, although responsibility for major traffic routes lie with Transport for London (TfL), the local Boroughs are responsible for all other streets. However, since TfL also controls the London Traffic Signals Unit, and has to be consulted on changes to roads of strategic importance, their responsibilities also extend over many roads formally controlled by the Boroughs (Jones et al 2007b: 5). The arrangements in London lead to a situation whereby high streets nearly always have two agencies responsible for the roads – TfL for the main street and the Boroughs for its tributaries. If the other components of the street are factored in: trees, street furniture, advertisements, shop fronts, mix of uses, parking, utilities, bus stops, CCTV, rubbish disposal, cleaning and cleansing, etc. making a common vision and purpose for the management of London's high streets will be all the more complex and elusive.

Across London there are 47 members of the Association of Town Centre Managers, representing schemes covering most boroughs and many of London's town centres (<http://www.atcm.org/membership/index.php>). There are also 31 members of London BIDs (<http://www.londonbids.co.uk/bid-locations.html>) reflecting actual or prospective Business Improvement Schemes. These memberships represent attempts to overcome some of the coordination problems and better manage London's town centre environments. Significantly, however, few cover high streets outside of London's major designated centres.

Yet, as SQW Consulting argue in their assessment of London's town centres for the LDA, these locations have very substantial sunk investment in fixed assets, and the protection and enhancement of these assets, whether in private or public ownership, is likely to be a great deal more efficient, and lead to greater economic impact than making a similar scale of investment elsewhere. They conclude that successful town centre renewal projects "have shown that maximising the value of public sector assets is likely to be very important in future due to reductions in other sources of funding for the public sector, including funding for regeneration and improvements to infrastructure and the public realm" (SQW Consulting 2009: 2). They argue that in Outer London, in particular, public sector investment in high streets can be used to restore private sector investor confidence and encourage a positive cycle of self-sustaining regeneration.

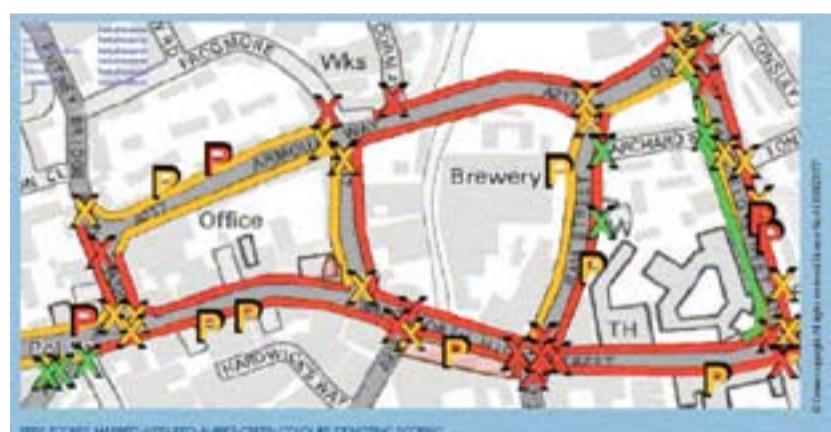
Given the significant development potential in and around London's high streets (see 3.4.3), it is likely to make considerably more sense to prioritise sites on or adjacent to high streets, than to those in less integrated locations, where the cost of infrastructure will be considerably higher.

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The arguments are reinforced by research examining the economic benefits of investments made to the public realm of London's high streets (CABE Space 2007). In this work, changes to residential property values and commercial rents were recorded for ten London high streets using multiple regression analysis. The work utilised the Pedestrian Environment Review System (PERS) to assess the quality of the pedestrian environment, and found that for each single point increase in the PERS quality scale, a corresponding increase of 5% could be found in both residential property prices and Zone A retail rents. Although increasing property prices is not a good thing per se (and can be a bad thing), it nevertheless demonstrates how some of the costs of public realm improvements can be captured in the long-term through reviews of council tax and business rates.

More importantly it demonstrates a perception that such changes have a tangible value to users; a finding that is reinforced through specific research

examining two further London high streets – the Holloway and Edgware Roads. In that work, a Stated Preference survey was used to identify whether high street users would be willing to pay more for public realm improvements: through their council tax, in public transport fares, or in rents for housing (Transport for London 2006). The analysis found that on average users were willing to pay, and that although the amounts were very small for each user (a few pence per improvement), when multiplied across users and across the year, significant potential public benefits were revealed that could help to support the economic case for investment.



example of PERS scoring

3.8 Conclusion: summarising the London-wide picture

High streets are complex phenomena and the London-wide picture is also complex. Mapping key data sources against high street locations revealed much about the strategic roles high streets continue to play across London, and about their future potential. Other sources reveal that many have declined and continue to suffer from disinvestment and poor management.

London's 500Km of high streets outside the Central Activities Zone grew variously from a combination of 'link' and / or 'place'-based development drivers, and today represent 3.6% of its road network, with a significance that belies their limited extent. The city's polycentric geography encompasses a range of high street types, most notably 'connected' and 'detached' types, either as part of the major linear routes through and connecting up the city, or sitting independently from these as part of a local network based on a pre-existing town or village.

High streets fulfil a vital economic function in London, as home to much of its huge retail economy. If, as predicted, the population of the city continues to grow, then so too will opportunities for many of these spaces over the long-term. However, without proactive public intervention, this growth will benefit some of London's high streets at the expense of others; continuing a consolidation of London's retail offer that has not been helped by the high costs of doing business on London's high streets, stemming, for example, from high rents, and high servicing costs.

One-size-fits-all solutions across London high streets will not be appropriate, nor will purely physical interventions. It is vital to understand the diversity of role and provision across London's high streets, playing to local strengths and bolstering the traditional social, financial and service network role of high streets. Significant opportunities exist:

- **Development opportunities:**

Three quarters of London's developable brownfield land and large Strategic Housing Land Availability Assessment (SHLAA) sites are on, or within 500 meters of its high streets.

- **Win / win benefits:**

With in excess of half of such sites within two and half minutes walk of a high street, and close to existing transport and social infrastructure, giving such sites priority status will have the win / win knock-on benefits. This makes high streets viable places for investment whilst inter alia, a thriving high street will make neighbouring sites more attractive.

- **Boosting quality of life:**

Perceptions of high streets are often different to the reality, for example crime is far lower on high streets than it is often perceived to be. Thriving high streets will deliver huge quality of life benefits to their existing substantial living and working populations.

- **Delivering employment opportunities:**

London is a global city, but also a local one. On or within 200 metres of its high streets it has a higher number of employees (1.45 million) working in almost double the number of businesses found in the Central Activities Zone. High streets support and boost small-scale entrepreneurial activity.

- **Benefiting all Londoners:**

The health of high streets are important to all Londoners as the inescapable context for their everyday life, with two thirds (5 million) living within a five minute walk and 10% actually on or immediately next to a high street. They disproportionately benefit many vulnerable, economically disadvantaged and less mobile groups.

- **Supporting civic life:**

Responsibility for the location of civic and community functions across the capital is fragmented and could be much better coordinated to stem the flight of such functions from the high street to support those still there. and, as a by-product, to support retail uses and the overall vitality of London's high streets.

- **Connecting up:**

High streets vary considerably in terms of access to public transport, although in the main larger connected and town centre-type high streets are very well served. In about half of London's high streets great potential exists to improve public transport accessibility further, taking advantage of the sizable concentration of mixed uses that exist there and the potential to stimulate existing development potential.

- **Web of regeneration:**

22% of the total area of Greater London is within 200m of a high road. Approximately 44% percent is within 400m. Prioritising investment along London's 500km of high streets could deliver growth and regeneration to a vast area, by focussing on just 3.6% of its road network.

- **Linear regeneration**

Many of London's high streets cut across administrative boundaries and areas with different demographics and levels of deprivation. The city is therefore not simply a collection of nodal town centres and surrounding residential areas, but a continuous urban fabric, joined by linear mixed use corridors. Investment in high streets will bring potentially significant regeneration benefits to all sections of London society.

Yet many of London's high streets have been in long-term decline since the 1970s, and, as the penultimate point above suggests, it may be necessary to look beyond retail to establish a viable future for some high streets, requiring public sector help in the process. On the negative side, London's high street network has become saturated by traffic with consequential high levels of pollution, many far in excess of UK objective levels, and representing a key threat both to the health of London's high streets and in a very real sense to their users and residents.

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High streets nevertheless represent substantial sunk investment in fixed public and private assets that, if invested in, are likely to lead to substantial and sustainable knock on economic impacts which can be captured over the long-term in council tax and business rates increases. Users are supportive of such investment and are willing to contribute to it through their council tax and public transport fares. But such interventions will need to transcend physical fabric, real estate, exchange, movement and management opportunities, and above all address the problems of traffic overload in many of these vitally important spaces.

The management context for London's high streets is, unfortunately, complex; complicated by the divide between TfL and Borough responsibilities. Outside of London's major town centres, there are few Town Centre Management or Business Improvement District schemes in place to more intelligently coordinate between responsibilities.

04 A Closer View

What is the potential of London's High Streets?

4.1 Six case studies

4.1.1 London high street typologies

The next stage of the study moved from the general to the particular, from London-wide analysis to six local high street case studies. Analysis in section 3.3.2 began to suggest a typology of high streets, and distinguished between 'connected' and 'detached' varieties, with variations in pattern found in Central, Inner and Outer London. In order to identify representative case studies for more detailed analysis it was useful to compare this analysis, with other typologies contained in the literature. The London First Retail Commission (2009: 10), for example, argue that it is vital to recognise the different types of 'centres' that exist in London, and to plan for them accordingly. They distinguish between:

- Town centres such as Ealing or Enfield
- Strategic level streets including the Edgware and Bayswater Roads
- Outer London high roads, such as the Tottenham or Chiswick High Roads
- Local high streets including Rye Lane in Peckham
- Secondary frontage, which is dotted across London.

By contrast, through their analysis of London's spatial centrality versus its economic vitality, Chiaradia et al (2008) suggest a simpler typology. They identify three key types of centre starting with the special case of high streets within the Central Activity Zone (the West End). Second, they identify 'Populous centres on main arterials' where the high local population and employment and high levels of pedestrian activity ensures success on the basis of high footfall rather than on the quality of the offer or local affluence (e.g. Brixton High Street). In such places shops tend to be larger and less street oriented. These can be contrasted with a third type, 'Sparse centres on secondary arterials', where lower local population and employment densities and associated lower pedestrian activity requires that success is derived instead from a higher quality (high value) offer, sustained by an affluent local population (e.g. Blackheath Village). In such places, shops are smaller and more street oriented. The analysis demonstrates the considerable market segmentation in London, driven as much by local market conditions as by location, and the need to tap into these very different high street contexts in order to understand the opportunities they present.

The problems and opportunities of the first of these types has been well covered in the London press, and includes the multiple problems of success associated with Oxford Street where the huge pedestrian and bus loads the street caters for day-in day-out have led in turn to conflict and to a range of speculative schemes to address the problems. More positive examples of success have been found in streets such as Kensington High Street, where the impact of public realm improvements, including the removal of unwanted signage and barriers, has been well documented, or Marylebone High Street, where the somewhat unusual ownership of the street – largely in the single hands of the Howard de Walden Estate – has allowed it to be minutely choreographed to become the centre of the self styled Marylebone urban village. This traditional high street now features a diverse offer of independent stores.

The second type is encapsulated in the analysis of the Upper Tooting Road / Mitcham Road approaches to Tooting Broadway, conducted by Jones et al (2007a). These segments of inner London high street demonstrate both the vitality of many such streets (a comprehensive array of shops and services, a strong day and evening economy, two markets, and a multi-ethnic clientele), but also how such streets are able to cater for a huge number of movements of all types (33,000 passengers to or from the underground station, 46,000 on or off buses, up to 1,500 pedestrians per hour at peak times, 160 buses per hour, and 17,000 vehicles along the road between 08.00 and 19.00); albeit with some conflicts (see 3.7.1).

Regarding the third type, URBED (2002) have argued that the increasing focus on Central London as the source of service-related employment has significantly undermined the city's outer suburban centres, many of which are focused on single linear high streets. In her studies of Borehamwood, however, Vaughan (2006) has noted how the urban structure of that Outer London suburb focuses movement and activity on to its high street (Shenley Road) so that residents, local workers and commuters all naturally continue to participate in the on-going life and vitality of the street. Thus despite changes in its function reflecting wider social patterns, the high street continues to operate as an important local place and as a focus for civic and commercial life.

For Jones et al (2007c: 57) 'types' of street reflect the relative balance between 'link' and 'place', more than geographical location. Analysing London's high streets they conclude that one size does not fit all, and that any assessment of type will depend on a local analysis of role and need. Thus Marylebone High Street, for example, is given a medium link status as it acts as an important local link within the city, whilst parts of the A2 through south east London will have higher link status determined by their role as key strategic connections. Similarly, Kings Road will have a higher place status than Brixton High Street, which has a higher place status than Streatham High Road, reflecting the relative reduction in their roles as destinations (city wide, to sub-city, to local in their catchment).

4.1.2 Choosing the case studies

To fully reflect the range of London high street types discussed above, analysis would need to pick up Detached and Connected variants, Central, Inner and Outer London types and examples from the broad east / south and west / north London swathes. It should also reflect the range of different morphological, density and socio-economic high street profiles found across London.

	Central	Inner east/south	Outer east/south
	Inner west/north	Outer west/north	
Detached	Marylebone High Street narrow/high/affluent	narrow/high/deprived Peckham High Street St John's Wood High Street narrow/high/affluent	wide/low/mixed Eltham High Street Wembley High Road narrow/low/mixed
Connected	Oxford Street wide/high/mixed	wide/medium/mixed Streatham High Street Tottenham High Road wide/high/deprived	wide/low/mixed South Redbridge High Road Ealing Broadway wide/mixed/affluent

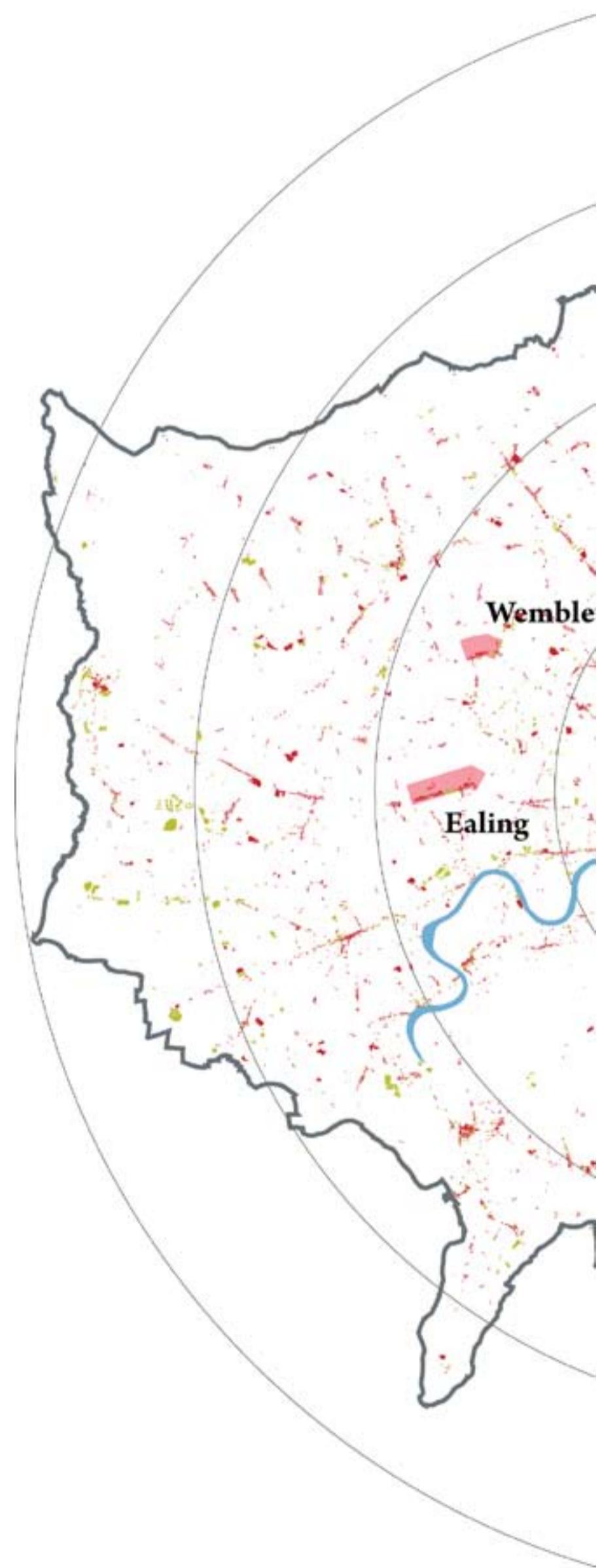
Morphological: wide/narrow
Density: high/medium/low
Socio-economic: affluent/mixed/deprived

Such a simple typology is represented above with examples from which six detailed case studies were chosen. However, given the particular national and even international draw of Central London as a retail destination and the unique contextual factors impacting on the location, it was decided that these high streets would be omitted from the study. It was also decided to bias the selection towards connected variants as these major cross-London routes demonstrate the greatest challenges for integrating traffic ('link') functions with other high street ('place') functions; perhaps the most critical issue for many of London's high streets.

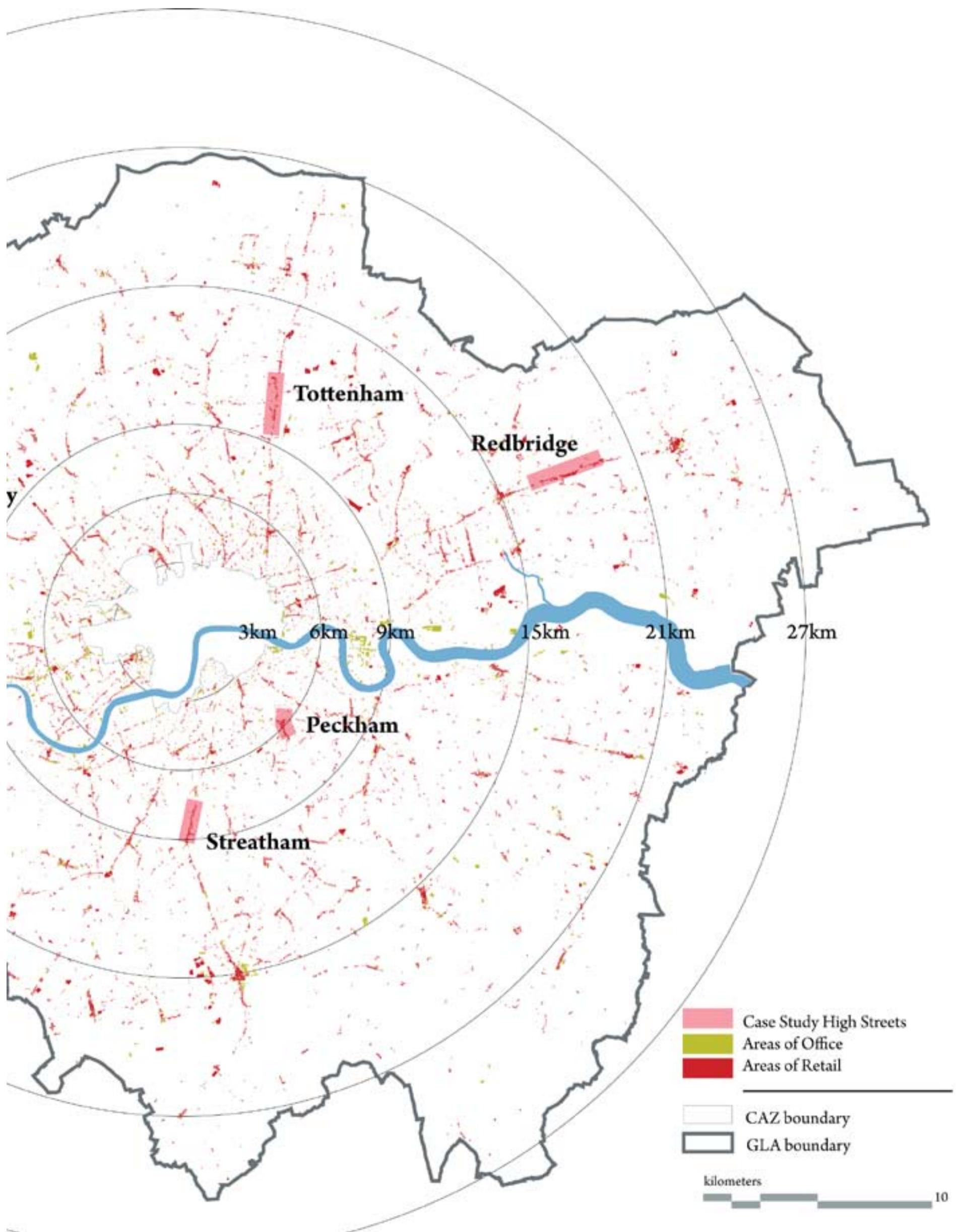
The chosen case studies were: Peckham, Streatham, Tottenham, Ealing, Wembley and South Redbridge. Collectively they represent: detached (2) and connected (4) variants; Inner (3) and Outer (3) London; north (1), east (1), south (2) and west (2) London; proportionally narrow (2) and wide (4) streets; higher (2), medium (2) and lower (3) density areas; and relatively deprived (2), mixed (3) and affluent (1) neighbourhoods (see section 4.4.1).

see map (right)

Each case study was subjected to detailed analysis across the range of high street functions: physical fabric, real estate, exchange and movement, and in terms of its management framework; both within the research team, and by groups of UCL MSc students. Propositions for change were subsequently developed by the student teams. In the case of the Redbridge case study, the research team worked in conjunction with the London Borough of Redbridge to make proposals to complement and supplement their emerging Area Action Plan for the high street area. Key crosscutting findings from this work, are presented in the remainder of this section.



Map: locations of six 'case study' high streets



4.2 Physical fabric issues

4.2.1 Physical structure

The case studies each demonstrated strongly linear patterns of mixed use development, in many places acting as a thin crust only (perhaps 20 meters deep) along both sides of the high streets. This was particularly pronounced in the case of the 'connected' high streets, where the depth of mixed use development was often very thin, although fattening out from time to time at particular concentrations of retail uses. Redbridge, Streatham and parts of Tottenham were particularly striking in this regard, all of which follow the line of ancient Roman roads. By contrast, the 'detached' high streets exhibited generally deeper mixed use block patterns, sometimes extending up to 200 meters from the high street itself. In the case of the latter examples, the high streets are shorter with the majority of mixed use development occurring in officially designated town centre zones (see 5.3.2). By contrast, in the connected streets, mixed use development often only coincides intermittently with town centre designations, most notably in the cases of Tottenham and Redbridge.

see maps (right)

The physical structure and official designations suggests different patterns of use of the connected and detached streets. For the continuous connected streets, users are most likely to visit parts of the street, rather than walking along the whole. Facilitating this, different sections of these streets often have very different characters, for example the Seven Kings stretch of the Redbridge case study is very different to the Goodmayes stretch. By contrast, the more compact detached streets will be used more like town centres, with users walking up and down the whole or a larger proportion of the high street.

4.2.2 Block structure (Refer to appendix E)

More detailed analysis of the block structure along the chosen high streets shows a huge diversity in size and layout. Although (fitting in with their more compact structures), the detached streets exhibited a higher proportion of larger block sizes, all the streets demonstrated a range of shapes and sizes. In the main these delivered permeable street networks, with good connectivity from each high street's hinterland onto the street itself. On occasions this broke down, for example the southern side of the South Redbridge High Road, or around the Broadway Shopping Centre at Ealing. In these instances, big box retail schemes, housing estates, or industrial estates have broken the dominant block pattern, hugely undermining local connectivity in the process.

Drawing from across the case studies, a matrix of block types can be developed. These utilise land uses as the basis for categorisation, but demonstrate a huge variety even within blocks used for essentially the same purposes. Often block types were seen repeatedly across the six case study streets, whilst the interruption caused by infrastructure sometimes gave rise to more individually shaped blocks with a more particular relationship to the place.

see (overleaf)

Maps of Physical Structure

In these maps blue denotes mixed use development at ground floor, with official town centre designations shown in red. The dotted line shows 200 metres from each side of the street.

SR

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How is policy facilitating the potential of London's high streets?

05

REF

AP

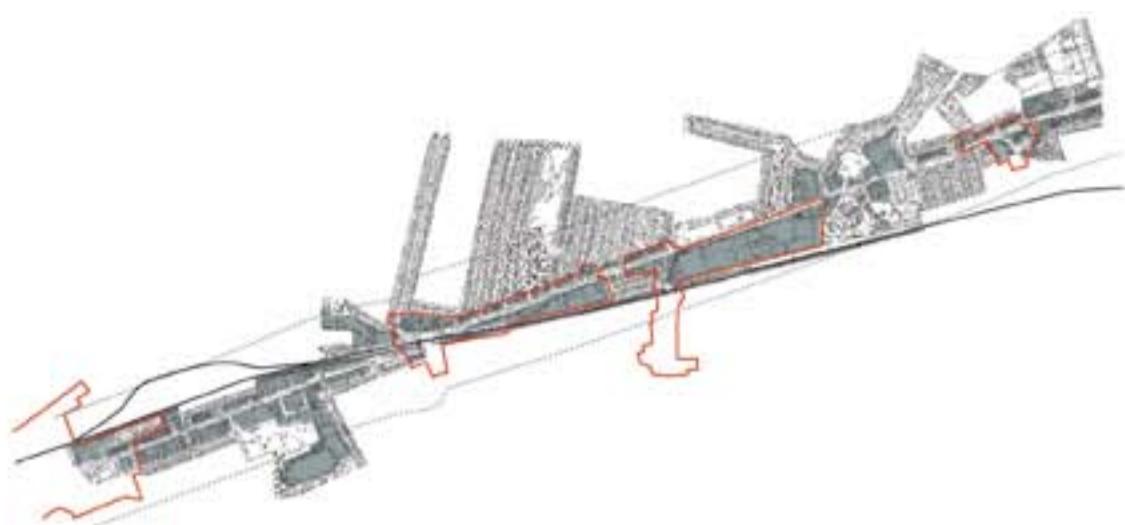
KEY

- mixed use (non resi) areas
- 'town centre' boundary
- 200m each side of high street
- Railway Line

km
0

EAL

Ealing



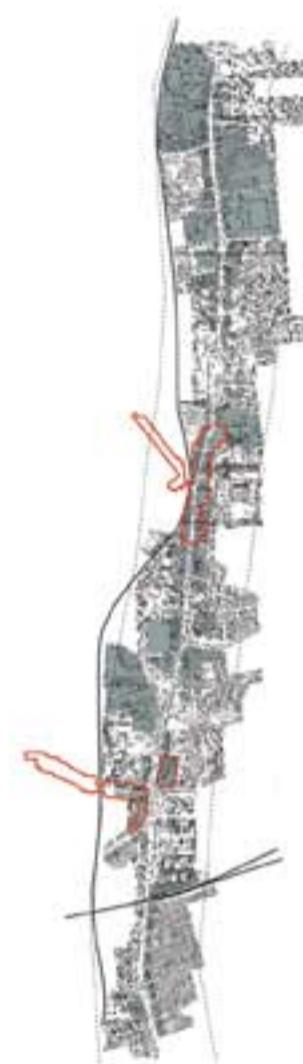
PKM

Peckham



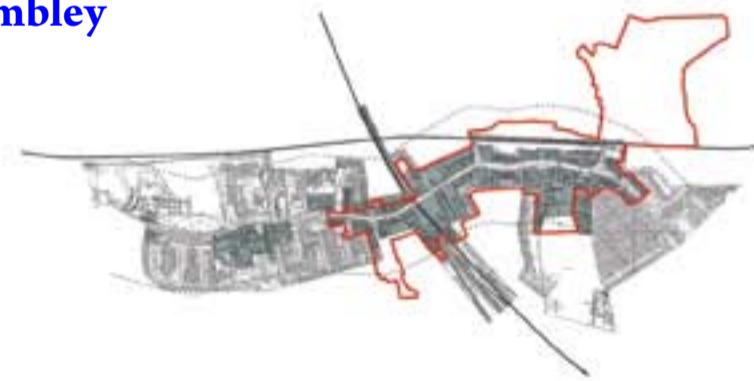
TNM

Tottenham



WEM

Wembley



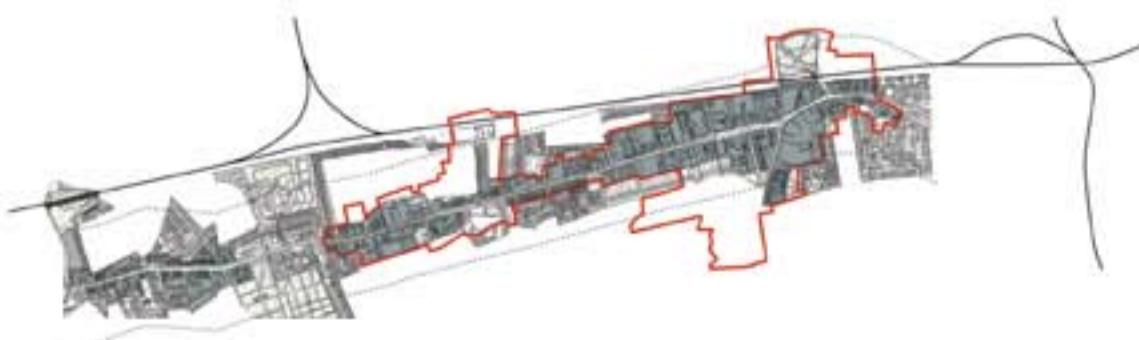
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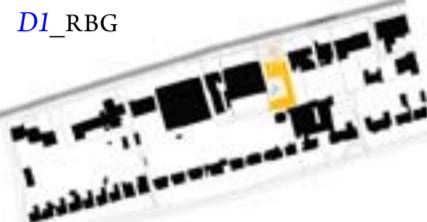
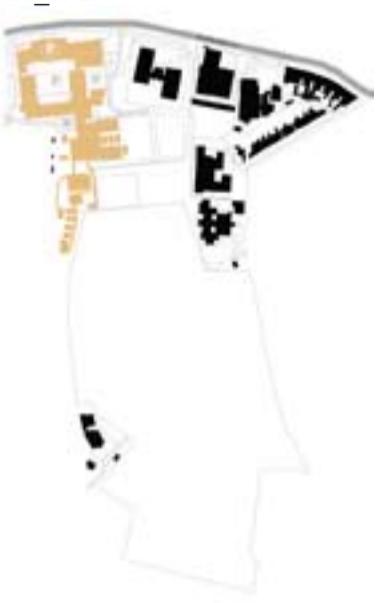
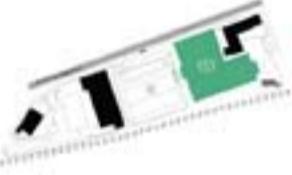
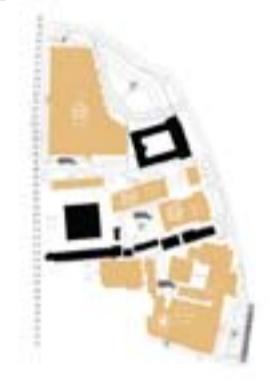
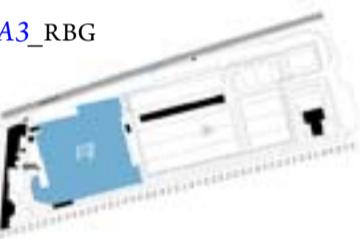
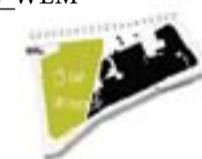
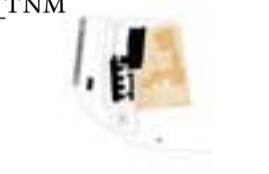
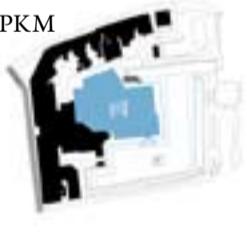
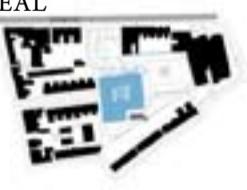
Streatham



RBG

Redbridge



A Supermarket	B Big Box Retail	C Shopping Centre	D Government/ Institution/Religion	E Education
<i>A1</i> _STR 	<i>B1</i> _RBG 	<i>C1</i> _EAL 	<i>D1</i> _RBG 	<i>E1</i> _WEM 
<i>A2</i> _STR 	<i>B2</i> _RBG 	<i>C2</i> _PKM 	<i>D2</i> _WEM 	<i>E2</i> _TNM 
<i>A3</i> _RBG 	<i>B3</i> _RBG 	<i>C3</i> _WEM 	<i>D3</i> _EAL 	<i>E3</i> _TNM 
<i>A4</i> _TNM 	<i>B4</i> _RBG 	<i>C4</i> _TNM 	<i>D4</i> _RBG 	<i>E4</i> _TNM 
<i>A5</i> _PKM 	<i>B5</i> _WEM 	<i>C5</i> _STR 	<i>D5</i> _EAL 	<i>E5</i> _PKM 
<i>A6</i> _EAL 			<i>D6</i> _RBG 	
<i>A7</i> _TNM 			<i>D7</i> _EAL 	
			<i>D8</i> _STR 	
			<i>D9</i> _RBG 	

SR

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How is policy facilitating the potential of London's high streets?

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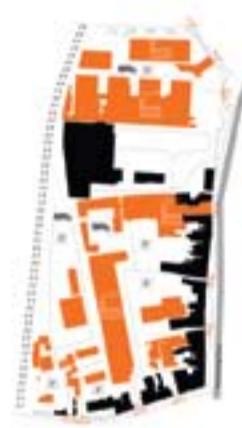
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AP

F

Employment - Industry

F1_PKM



F2_STR



F3_TNM



F4_STR



F5_PKM



F6_RBG



F7_TNM



F8_STR



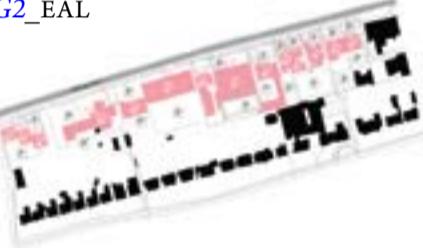
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Employment - Office

G1_WEM



G2_EAL



G3_STR



G4_RBG



G5_TNM



G6_WEM



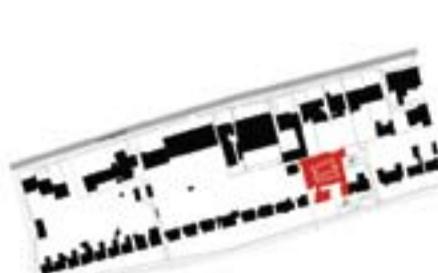
G7_PKM



H

Leisure

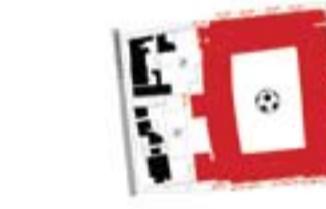
H1_EAL



H2_STR



H3_TNM



H4_PKM



H5_RBG



H6_STR



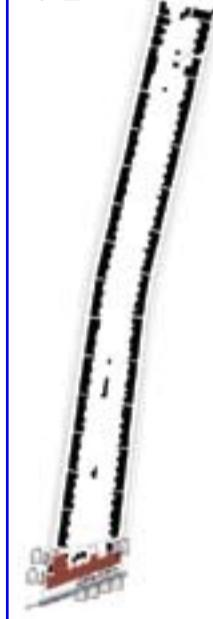
H7_RBG



J

Small-scale Retail

J1_RBG



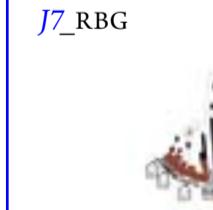
J3_STR



J5_STR



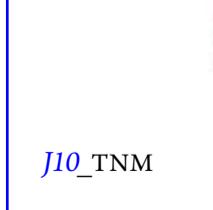
J7_RBG



J8_WEM



J9_EAL



J10_TNM



4.2.2 Block structure (cont.)

Taking supermarkets as an example, analysis of supermarket-based blocks demonstrate examples of supermarkets that have been carefully designed to integrate in an urban sense (although not necessarily architecturally) with the street scene, for example the Tesco at Tottenham, whilst further along the same street, the Sainsburys presents its car park to the street, with the shop itself sitting well back on its plot, and breaking the continuity of the mixed use street wall. Elsewhere, supermarkets are well integrated within urban blocks and behind the street wall, as for example the two Sainsburys stores at Peckham and Ealing or the Lidl at Streatham. Alternatively, they have sometimes been allowed to turn their backs on the high street, as is the case with the Streatham Sainsburys store that is entered via its car park at the rear; or destructively fill the whole block in a 'suburban' big box and big car park format, destroying the integrity of the street in the process. These different formats will make very different contributions to the life and vitality of the high street, some very positive, and others almost entirely negative.

As anticipated, we can discern a difference between the scale and organisation of retail development that is predominantly dependent on movement and access by foot (or to the same degree, cycle) and that predominantly by car. In the latter retail types, the depth of the block becomes the sole effective value parameter, whereas in the former, it is primarily the street frontage that brings value. Where the ground floor frontage is valued for retail and key services, the depth of block may then be colonised by those uses that do not rely on retail frontage, but that benefit from their location on a highly accessible part of the spatial grid.

Car-orientated development that makes little or no relationship with the street has a profound impact on the quality of the streetscape and consequently on the viability of surrounding, more pedestrian-orientated frontages, potentially creating a vicious circle of high street decline. It overwhelmingly tends to compromise pedestrian (or cycle/public transport) access in favour of car access, even when many trips are made by these modes. This can be seen acutely at Tesco's in Redbridge where a change in level and seemingly un-necessary road-widening to create access to the retail park site, result in a barely-functioning pedestrian environment.

Whereas the scale and type of offer may have an impact on how people travel to the high street, it is clear that the opposite is also true: the mode of movement along the high street can have a profound effect on the viable scale and organisation of the street. In other words, street that is used primarily by cyclists and pedestrians will necessitate a specific type of development: one that is predicated on the value of frontage.

Improving the streetscape environment and a modal shift in movement could therefore have a profound impact on the street. Observed examples in the Netherlands (Rotterdam), suggest that if well-integrated in the street structure, smaller, front-orientated retail survives very well adjacent to larger supermarkets because of the different markets that they serve.

see diagrams (right)



Tesco. Tottenham



Sainsbury's Tottenham



Sainsbury's Ealing

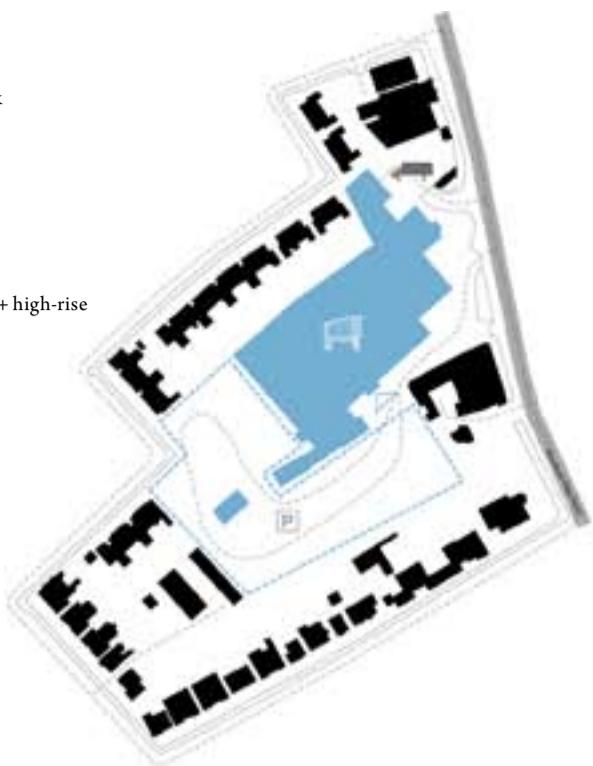
A2 Streatham Sainsburys

- access from within the block
- car park within the block
- service access at the front

block size: 230 x 235m

also in the same block:

- Pub + Restaurant
- Residential: semi-detached + high-rise
- Church



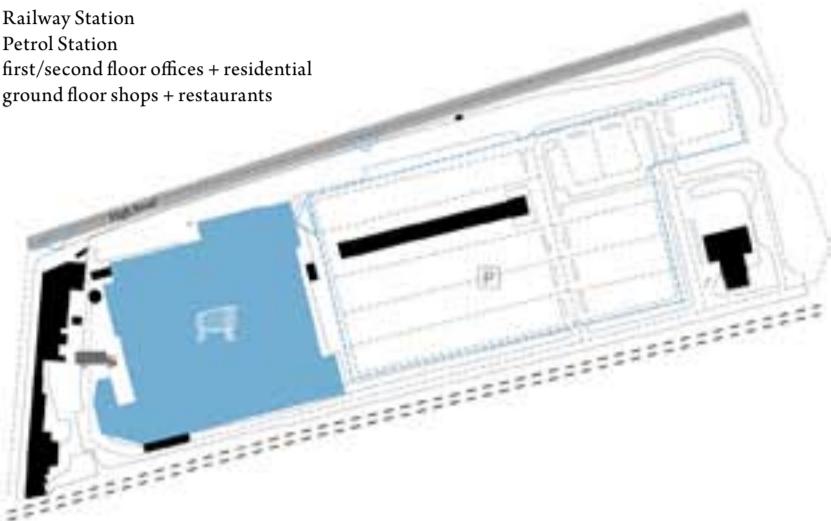
A3 Redbridge Tesco Extra

- access along ramps from the High Street, or from within the car park
- large car park to the side and service delivery to the rear

block size: 350 x 130m

also in the same block:

- Railway Station
- Petrol Station
- first/second floor offices + residential
- ground floor shops + restaurants



A1 Tottenham Sainsburys

- access from within the block
- car park in front
- service access to the side

block size: 420 x 200m

also in the same block:

- Garages
- Peacock Industrial Estate
- Ground Floor shops, pubs and fast food restaurants
- Offices
- First Floor Residential



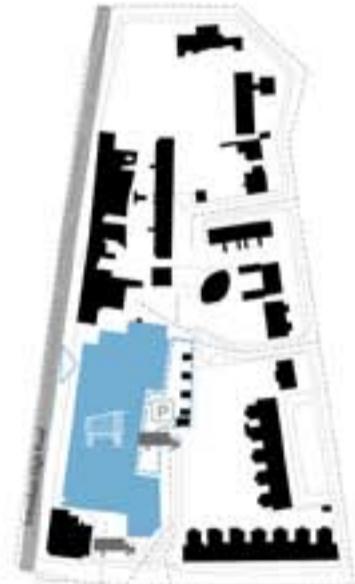
A4 Tottenham Tesco

- access from the high street
- delivery to the side and the rear
- roof-top car park

block size: 275 x 175m

also in the same block:

- first/second floor offices + residential
- ground floor shops, pubs + restaurants
- semi-detached residential
- roof-top residential (above Tesco)



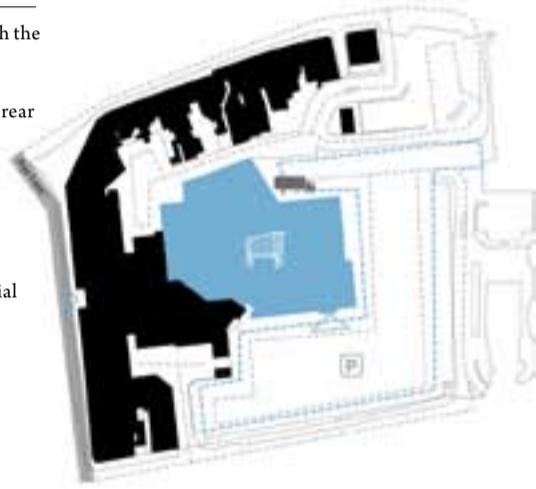
A5 Peckham Sainsburys

- access from the High Street through the shopping centre, or from the rear through the car park
- car park and service delivery to the rear

block size: 195 x 185m

also in the same block:

- Shopping Station
- Bus Station
- first/second floor offices + residential
- ground floor shops + restaurants



A7 Tottenham Aldi

- access from the high street
- car park and delivery to the rear

block size: 275 x 175m

also in the same block:

- Primary School
- Industry buildings
- Gym
- first/second floor offices + residential
- ground floor shops, pubs + restaurants
- semi-detached residential



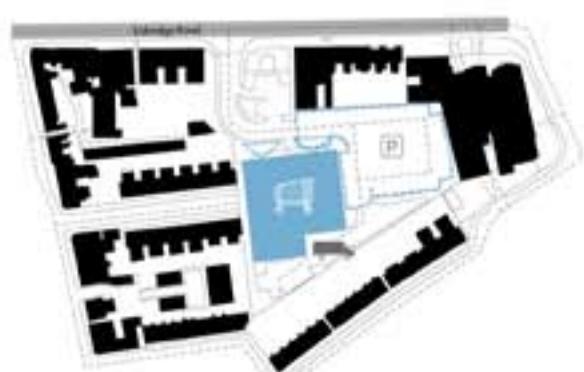
A6 Ealing LIDL £-Stretcher

- access from inside the block
- delivery to the rear
- car park within the block

block size: 250 x 175m

also in the same block:

- ground floor shops, pubs, offices + restaurants
- first/second floor offices + residential
- terrace housing
- car dealership
- church
- gym



KEY

Supermarket

Pedestrian Entrance

Car Park

Service Entrance

Vehicle Access

Railway Line

km

0

10

4.2.3 Block character (Refer to appendix E)

Even in the case of the largest big box stores, some diversity of uses is still found within the urban blocks in which they sit. This diversity of uses is a critical distinguishing feature of blocks found along all the high streets. As well as diversity on the high street itself, the depth of blocks immediately behind the frontage often houses many different uses, some of which have frontage on the street, but much of which does not. This depth of activity feeds the street, through the multiplier effects that only intense mixed use activity can bring (see 1.1.6).

Likewise though to a lesser extent than the horizontal hierarchy, the vertical hierarchy above the ground floor shop front, offers a mix and variety of use and activity, for example the terraced property typically allows for varied office-like uses above ground floor, though gyms, training and other varied uses have also been observed.

Drawing some of the blocks as three dimensional axonometrics reveals the rich layers of activity which, as well as retail uses, variously encompasses: sports facilities, recycling centres, child care and educational uses, restaurants and cafes, religious facilities, offices and financial services, private and social housing, storage, garages, building supplies, leisure establishments such as cinemas and banqueting, health facilities, studios, parking, light industry, emergency services, travellers community, funeral parlours, and even a cemetery. This often hidden diversity is almost infinite, as is the variety in character that the various mixes and their numerous block frontage / block interior relationships give rise to. It helps to explain the extent and importance of high streets as centres for London's employment and also the impressive figures given at 3.5.2 (above).

Most analysis methods used by the spatial and economic planning disciplines will use land-use plans that show ground-floor use only, that will also fail to pick up the actual 'on-the-ground' uses that are typically the kinds of activity that define the high street. For example a building in S. Redbridge High Road may be classed as 'Industrial' on the Cities Revealed database, but actually house the following activities: 3no. car mechanics, car and van hire, large gym, sports centre, language an A-level tuition, along with the industrial use of manufacturing of engineering parts.

We can see therefore that the smaller scale of economic (and in particular non-retail) activity will tend to fall 'under the radar' when it comes to spatial and economic planning priorities, and this refers back to points addressed by Griffiths et al (2008:1164).

This mix of uses is typically one block deep along London's high streets, although the blocks vary tremendously in depth, with some uses (e.g. institutions, leisure, supermarkets and industrial uses) requiring a much deeper block than others (e.g. small scale retail and office uses), some of which have no interior at all (although still a mix of uses). Beyond the first block, residential uses predominate, although with some larger industrial estates and institutions pepper potted along the connected streets. Predominantly the relationship between uses both on the high street and behind it seems unstructured, although groupings of certain activities sometimes develop (e.g. estate agents), taking advantage of the availability of particular types of units and of the benefits of concentration to attract customers.

Buildings themselves typically relate well to the high street, but only casually to adjacent buildings, and rarely across the street. The blocks show a strong ability to accommodate change, with mixes of uses (and even the built fabric) that are dynamic and constantly changing. In being adaptable, the buildings on the street frontage are generally more robust and longer lasting, whilst buildings behind are more transient and often temporary in nature; the combination of which allows for both continuity and change. This is particularly true in the deeper blocks (70m plus) which house larger structures which may be occupied by many different types of use. The urban

block opposite the station in Seven Kings illustrates this point. The terraced retail parade has remained constant (other than the ongoing change in retail offer) whilst the brick boxes to the rear have seen more frequent physical change, for example the fairly ad-hoc transformation from carpet showroom to mosque.



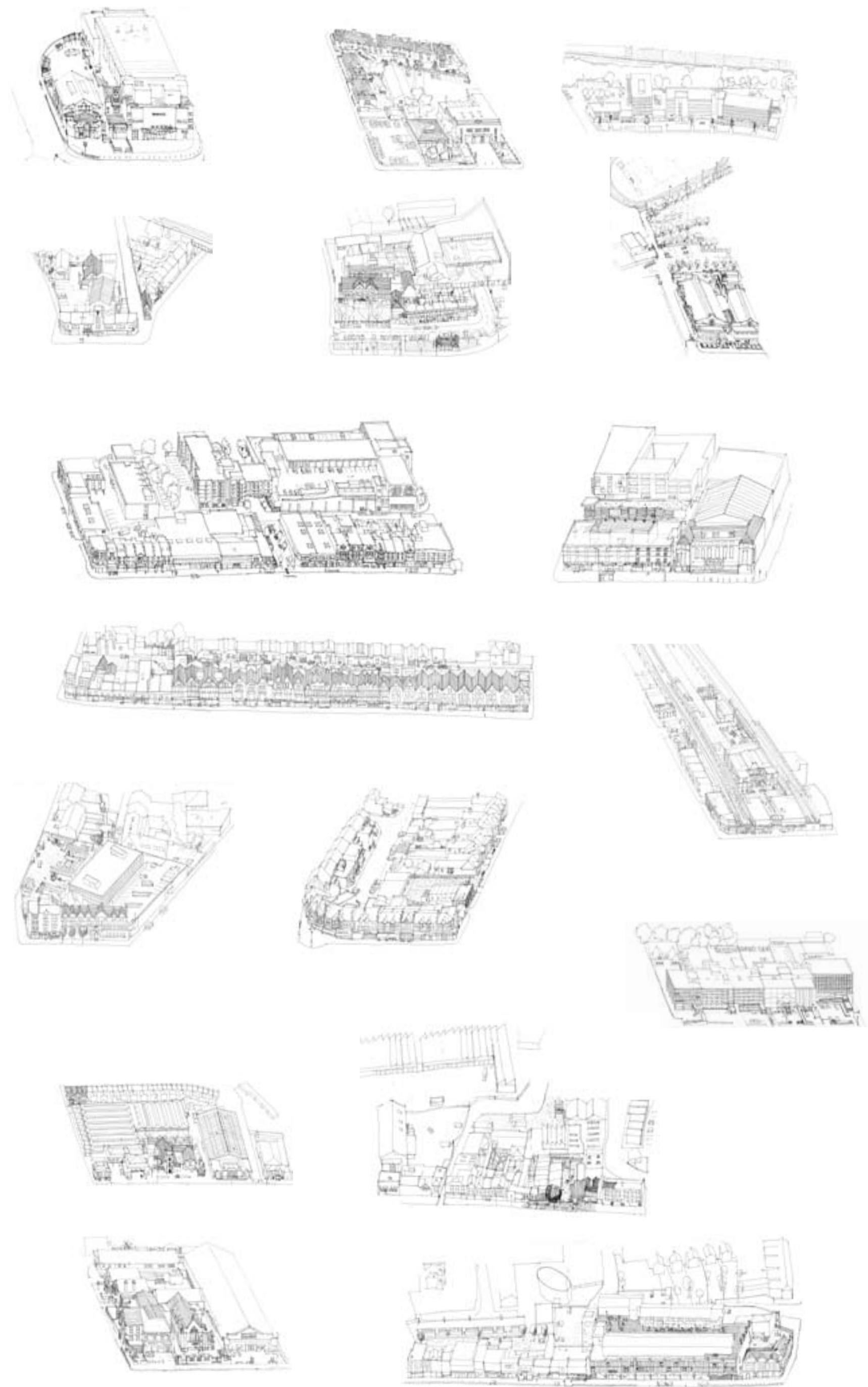
Uniform terrace fronts. Streatham



D.I.Y. Shop 'front' to interior of block. Wembley.



Go-Kart track within old Bus Depo. Streatham.



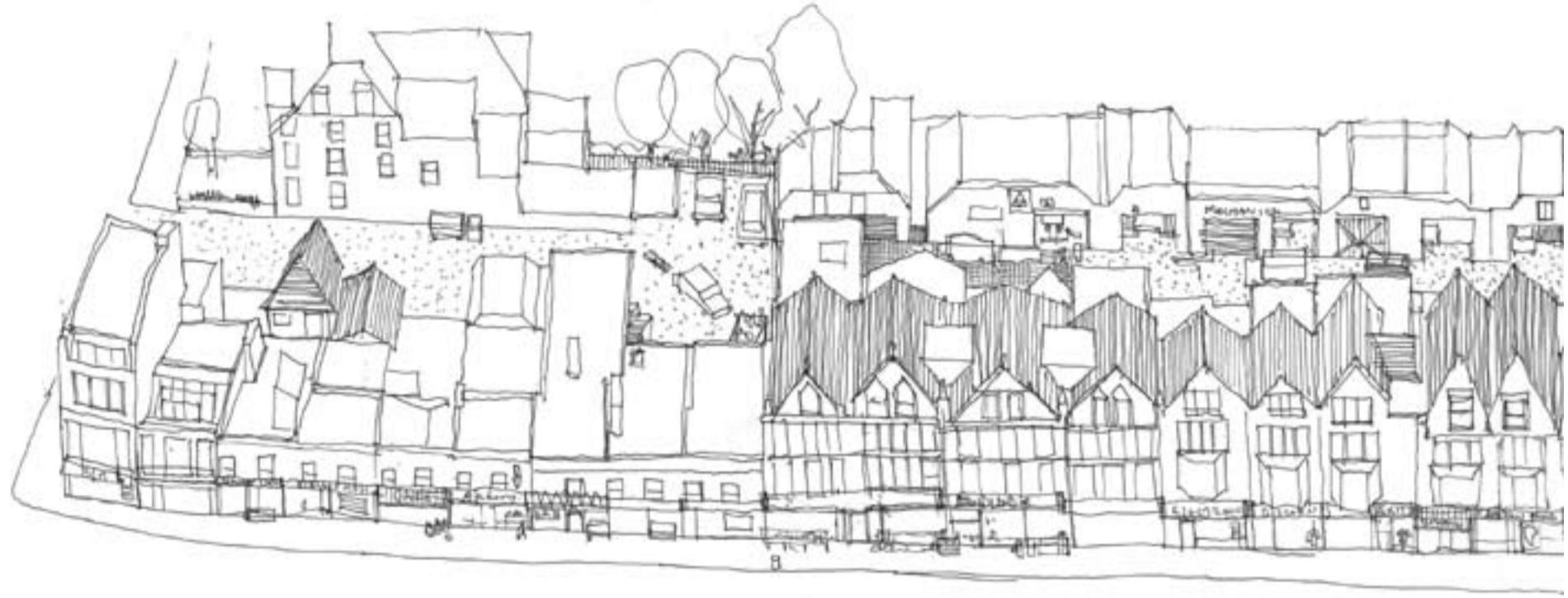
Drawings: sketches showing mixed-use blocks along high streets.
For full list and description refer to appendix E

SK04

STM long Terrace & Mews

Uses:

- Residential/storage above shops
- Mews of predominantly automotive uses
- Cash and Carry
- An assortment of uses to rear of shops, including residential, storage housed within ad-hoc extensions.



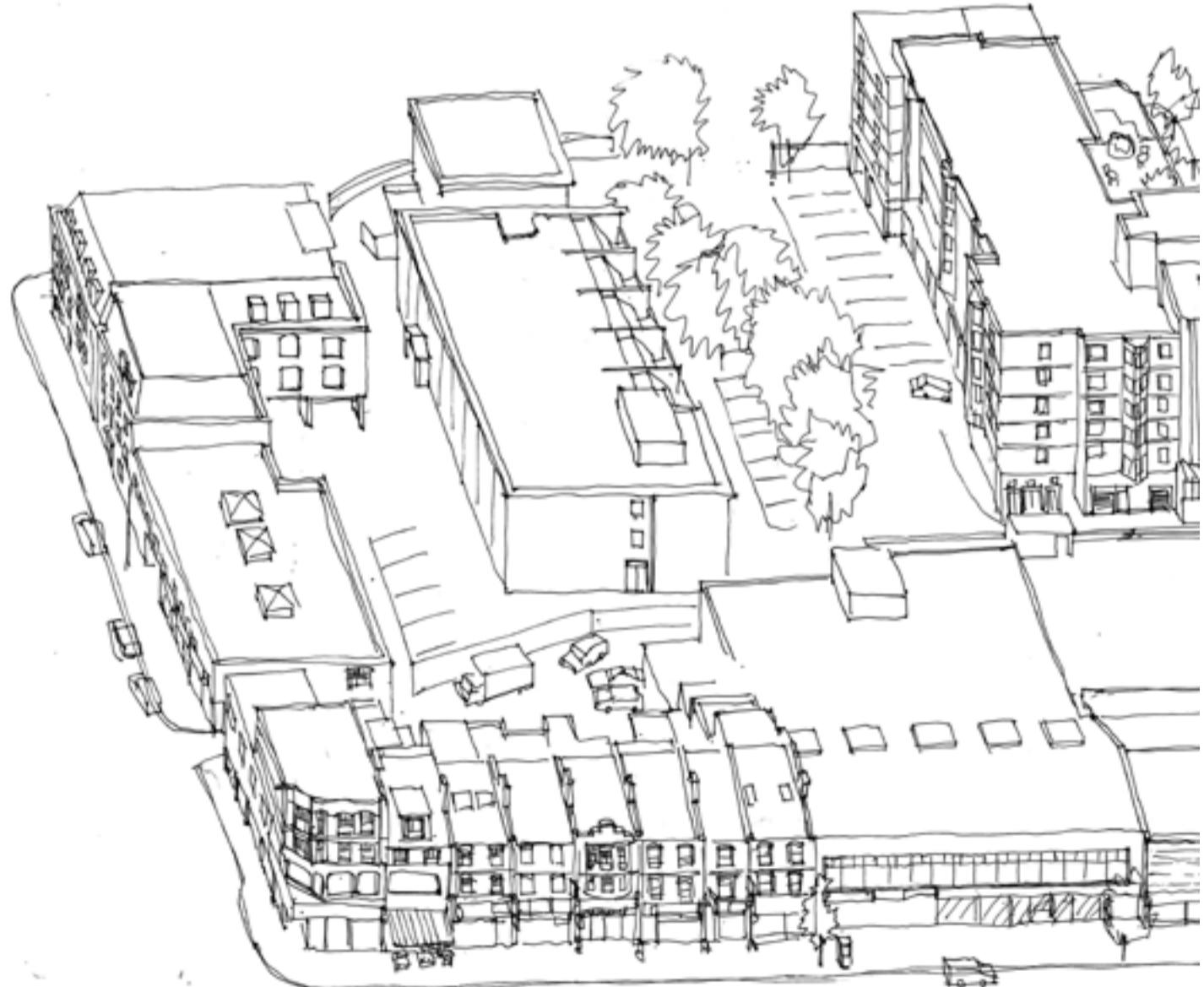
SK05

EAL Sainsburys

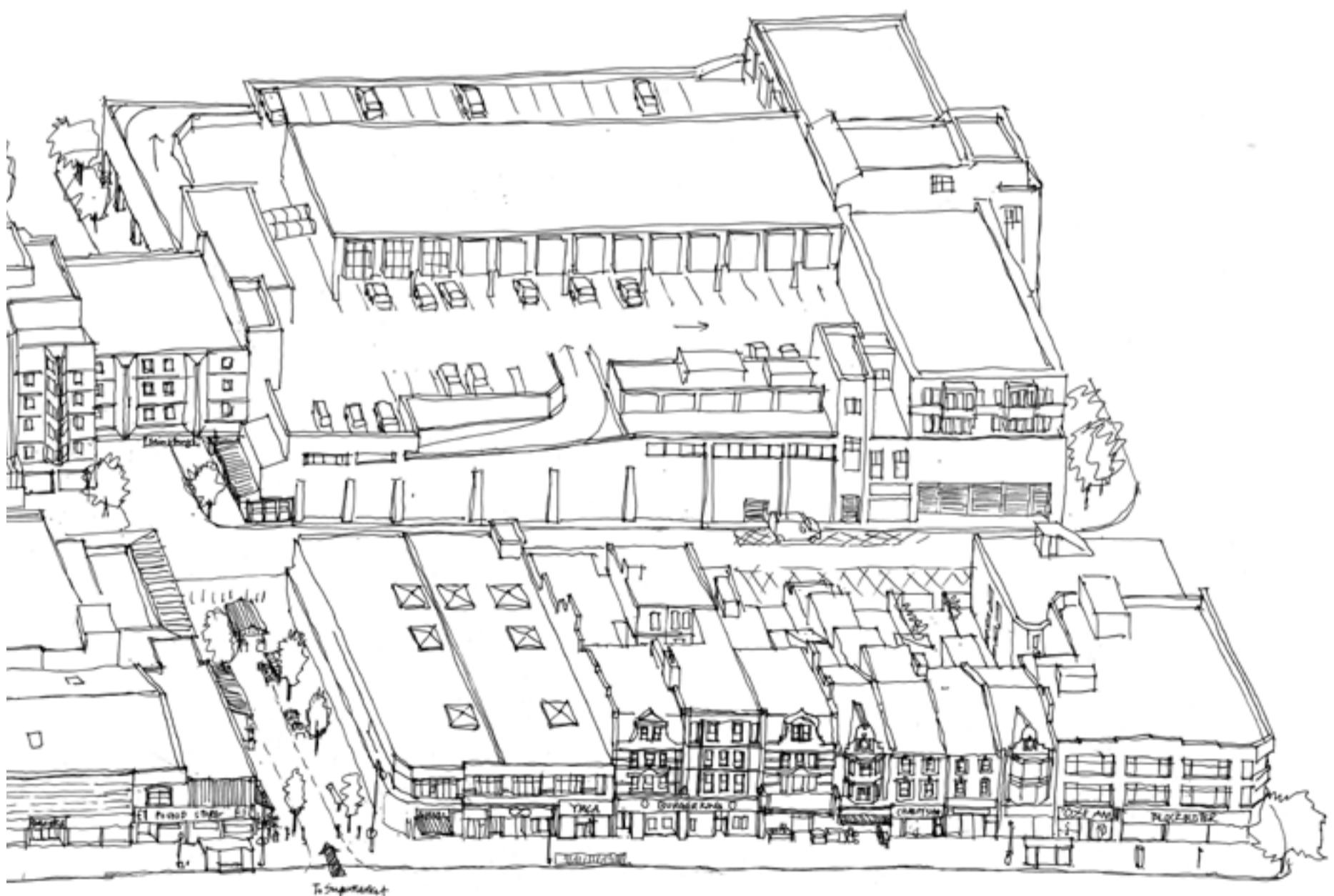
Block Reference: B3 + D5

Uses:

- Sainsburys + carpark on roof
- Pedestrian link from road, with market stalls
- Library built as a part of the supermarket development
- Health facilities
- Social housing
- Terraced shops form street frontage includes cafe, video rental, pound shop and large peacocks clothing store.
- Job centre
- Office building



Drawings: sketches showing mixed-use blocks along high streets. For full list refer to appendix E



4.2.4 Street character (Refer to appendix E & F)

Reflecting their particular histories, mixes of uses, and relationships to their roads, the six case study streets each have very different characters. Common to each is the layers of development and change that can be read in individual buildings and along the street. Thus Victorian and other pre-war buildings of considerable quality are often masked by more recent contemporary shop frontages of more dubious quality (e.g. Peckham), and by brash, even garish signage. These are interspersed with occasional examples of 'stand out' architectural quality, e.g. the Old Town Hall in Ealing, and by more recent buildings that lack the visual intricacy and robust quality of their Victorian and Edwardian counterparts, and that interrupt the scale of the streets, and sometimes on the quality of the pedestrian experience below (e.g. the new Wembley Central Tower).

The result is the mixed almost haphazard townscape scene that characterises most of London's high streets, an impression multiplied by the equally haphazard, cluttered, and crowded nature of the streetscape, including the street furniture, signage, lighting, planters, utilities boxes, traffic controls, etc. For example, at one cross roads junction along Wembley's Ealing Road, 62 separate pieces of street furniture were counted.

Despite the somewhat haphazard aesthetic, the high roads possessed no shortage of visual interest, and retain a certain character and quality. This suggests that despite the poor quality of much of the building stock fronting many high streets, the critical factors are the orientation of the buildings to the street, the integrity of the building line and that the general scale of the buildings and streets is respected.

High streets possess visual interest and character. The quality of the building stock is less critical than the orientation of the buildings to the street, the integrity of the building line, the general scale of the buildings and the section of the street.

If these factors are respected, opportunities for redevelopment should be good. Some limited attempts to rationalise street furniture have also proven that a less cluttered streetscene is possible and is perhaps more important than the architectural quality of the buildings to the overall impression and visual quality of the street, as well as to improving the freedom of movement (e.g. parts of Streatham).

The characters of each of the case studies were found to vary significantly along their length. It is possible to define a number of different centres or places along the corridor, though the boundaries of these are rarely strongly defined and often overlap.

Historic centres, clustering of use types (for example civic or employment in Ealing and Streatham), transport hubs and the manifestation of connections to surrounding communities all have visible effects and play a role in to the formation of character areas along the streets.

In physical terms the road width and street section, the location of landmark buildings, the rhythm and scale of terraces, topography and proximity to landscape as well as changes in the building line (from compression to release) also had a defining role and contribute to the unique journeys down the individual high streets.



Redbridge



Wembley



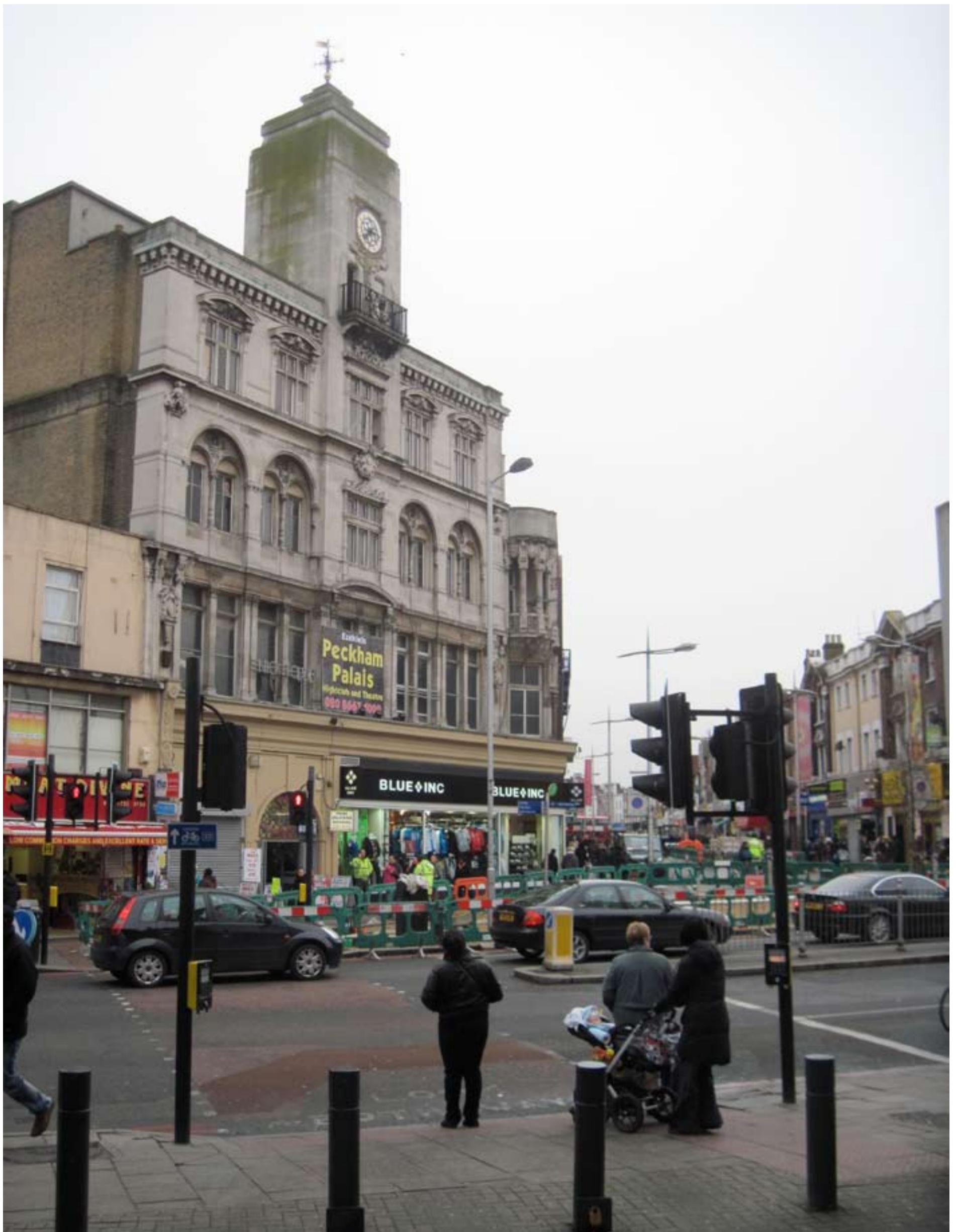
Tottenham

Facing page: Peckham

Juxtapositions of scale and type along high streets. Buildings have a role as background as well as forming figurative and important markers along the street.



Ealing : Buildings and shop types indicate specific communities and user groups.



PKM
Peckham



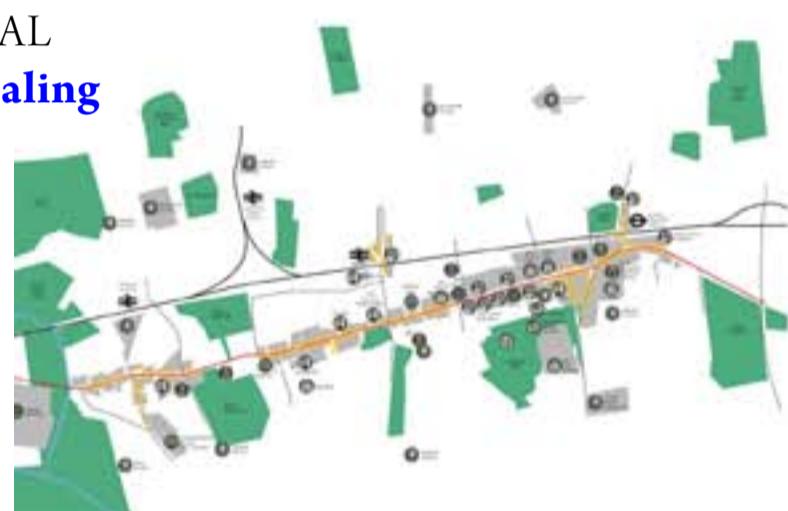
Streatham

WEM
Wembley

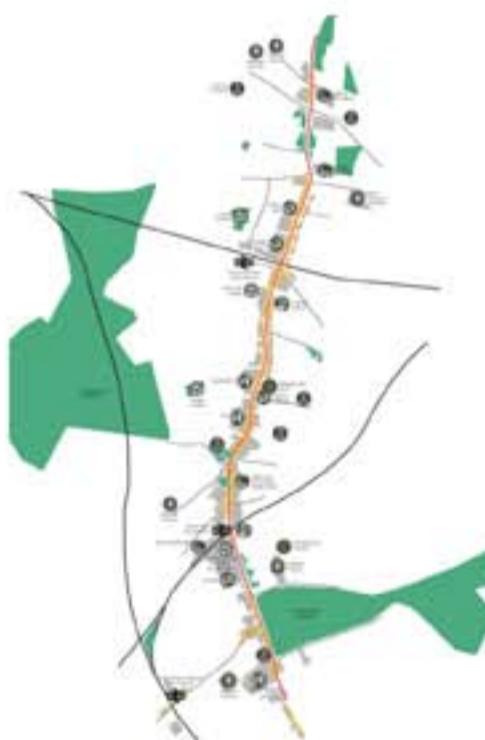


Wembley

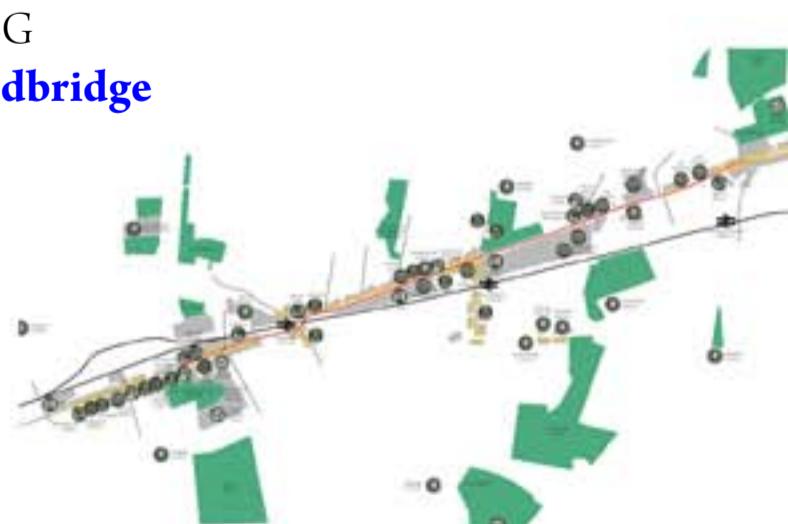
EAL
Ealing



STM
Streatham



RBG
Redbridge



Ealing

Above: Maps showing spatial organisation of key uses along the case study high streets



4.3 Real estate issues

4.3.1 Rateable use and value

Using data from the Valuation Office Agency 2010 rating list², it was possible to identify the rough proportions of non-domestic uses within each of the six high streets and their 200 metre hinterlands (between the use types of Retail, Industrial and Office only). Valuation use classes varied between retail, retail services, retail supermarkets, office, industrial, industrial factories, and transport, with the mix between each revealing something about the nature of each high street. Thus all high streets (or their hinterlands) contained some industrial-type uses, although Wembley and especially Ealing had a much lower proportion than the others (in terms of property numbers, 7% and 3% respectively), perhaps reflecting their more suburban contexts. Tottenham exhibited the highest proportion of industrial properties at 21% of properties. By contrast, Ealing, and to lesser degrees Tottenham, and Wembley, had a high proportion of office uses (34%, 27% and 23%).

If we analyse the square metre areas, instead of the number of properties, we find that Redbridge and Tottenham have very high proportions of immediate hinterland in industrial use (44% and 42% respectively), in excess of the retail use (43% and 39% respectively). Wembley has approximately the same area of office use as retail. See Appendix B ix.

On average across the 6 case study streets,

21% of non-residential floorspace within
200m of the high street was in industrial Use

But whilst Wembley exhibited the highest average rateable value for office space £237/m², Tottenham recorded the lowest at £106/m² (perhaps indicating an over-supply), with Ealing in between at £188/m².

Retail uses dominated all the non-domestic uses in and around the high streets, accounting for (typically) about 60% of non-domestic addresses between the three dominant use classes (Retail, Industrial and Office). Across all use classes the average proportion was 55%. In Streatham, however, this figure rose to 66% of all non-domestic uses, but fell to just 44% in Tottenham. Retail rateable values ranged between £237/m² and £357/m² (in Redbridge and Wembley, respectively), with one outlier – Ealing – where average rateable values of £895/m² are demanded, perhaps explaining the domination by multiples and some of the problems with vacancy that the area has experienced (see 4.3.1).



Chemist Shop. London 1971

4.3.2 Retail – now and then (Refer to appendix H)

For a more fine-grained analysis of uses along the actual high streets themselves, uses were counted manually along each street and compared with data from the 1971 Census of Distribution (see Thurstan-Goodwin & Gong 2005) to get a sense of what had changed over the last forty years³.

The 2010 data shows six high streets, each with their own particular mix of retail, reflecting their particular socio-economic profile (see 5.4). Peckham, for example, shows a street dominated by its ethnic retailers with an emphasis on specialist foods to cater to that market. Thus Peckham hosts 17 grocers and 14 butchers / fishmongers. By contrast, Streatham is characterised by a range of young professional 'yuppie'-type uses, including 46 cafes and restaurants, and 22 estate agents. And whereas Ealing is dominated by its high street brands and shopping centres (42% of its offer are chain stores), with an emphasis on clothing and footware and few services; Tottenham is dominated by its independent (often marginal) businesses (85%), including 24 hairdressers and barbers, 27 fast food outlets, and 22 mainly small grocers and supermarkets. Finally, whilst Wembley is perhaps closest to an 'average' small scale high street, with a mix of retail and services outlets (travel agents, for example, serving the need of the culturally diverse local community), Redbridge is dominated by its 'big box' retail and by less diversity of small scale uses.

see photos (right)

Comparing the scene today across five of the six high streets (no 1970s data was available for Redbridge), further clear trends are apparent. Most notably, there appears to be a stark increase in independent retailers and service providers (75% now compared to 55% in 1971) 4, which may in part be explained by a stark increase in numbers of discount stores, beauticians and travel agencies, who are likely to be independent.

Also whilst some new types of retailing have sprung up and thrived, other traditional forms have declined.

Those that have declined:

- TV hire shops – down 97%
- Clothing and footware (especially men's and boyswear) – down 59%
- Household goods – down 47%
- Confectioners / tobacconists and newsagents – down 38%

Those that have thrived or sprung up:

- Mobile phone shops
- Phone / internet cafes
- Beauty / nail parlour / herbal medicine shops (on average 11% of the high streets)
- Services including travel agencies
- Charity and pound shops (Ealing hosting most of both, 9 and 4 respectively)

Some of these trends are clearly the result of changing and cheaper technologies. Others, by contrast may be due to a consolidation of types of retailing in certain locations, for example: fashion in larger town centre locations (e.g. Ealing instead of Peckham, the latter reducing from 103 to 41 shops of this type) or household goods into large supermarkets. The types of trends discussed in the literature (see 2.2.1) are also likely to be responsible for at least part of the demise of certain small shops, such as newsagents and – in some places – fresh food retailers. By contrast, the specialist tastes of the culturally rich groups that frequent many of the case study high streets seem responsible for much of the diversity of independent food retailing that survives, and the proliferation of cafes and restaurants.

see photos (right)

2 Reclassified from VOA Rating List 'Description, broadly following Smith (2009)

3 It should be noted that the comparison may not be entirely accurate due to differences in interpreting categories of retailer and uncertainties around the boundaries surveyed in 1971.



Ealing Broadway 1970



Ealing Today



Kingsland Road 1971



Wembley today



Shopping precinct. 1976



Redbridge Big Box retail today

4.3.3 Development sites (Refer to Appendix G)

As well as considering the profile of the streets as they exist today, some attempt was made to consider the types of development potential that the streets provide through analysis of the sorts of development sites that (collectively) they offer. Any actual development potential would need to be considered in the light of the state of the local market and the availability of private investors or public funds. In theory at least, three key types of development site can be identified:

1. Underutilised buildings:

which vary dramatically in scale, from small individual plots, to large former leisure facilities (cinemas, bingo halls, skating rinks, leisure centres, etc), to very large but now derelict office buildings or other building complexes. This type of opportunity occurs frequently along the six high streets, often in clusters, with a significant proportion of units empty above the ground floor. Buildings vary in quality from the iconic to the everyday, but will often require extensive work, or demolition to make way for a larger scale development opportunity. In all such cases, difficulties with access and land ownerships may require public intervention, with opportunities ranging in scale from major new mixed use schemes, to small scale temporary uses such as exhibition venues or pop up shops.

2. Underutilised and vacant land:

either on or behind the high street will in many provide the most technically straightforward of development opportunities, although complex land ownership patterns and rights of access may undermine this potential:

a. Temporary car parking and storage fall into this category, uses that would be displaced if development proceeded. Sites of this nature vary hugely in size, as would the development opportunities (and types) they present.

b. Re-use of former industrial land is possible where industrial parks, large warehouses, distribution centres and bus depots are no longer viable. Sometimes existing uses can be used imaginatively for alternative uses, such as Streatham's Go-Kart track with an old bus depot, but often such sites are earmarked for major developments. Critically, such sites need to be considered in the context of their impact on the high street, and not in isolation. This may include residential, but other uses that reinforce the attraction of the high street and lead to multiplier effects, should also be considered.

c. Development sites close to infrastructure, were frequently found on the six high streets, reflecting the presence of rail lines close to each street. Such sites might also encompass sites close to major roads infrastructure, canals, multi-storey car parks, or other major infrastructure. These sites have similar development opportunities to the intensification of large ex-industrial sites, and also some of the same drawbacks, including the displacement of marginal but valuable businesses in need of low cost sites. Again, it will be important to consider these in the context of a vision for the wider high street area.

3. Intensification of existing uses:

offers one of the major opportunities for upgrading existing high streets, although with particular difficulties around land assembly. Again such opportunities vary hugely in scale:

a. Scale terraces of lock-up shops, can provide valuable local services, but also suffer from neglect and vacancy. If comprehensively redeveloped, they may offer the opportunity to substantially upgrade high streets, but at the danger of undermining the availability of cheap space for independent local businesses.

b. Intensification of larger retail formats – supermarkets, showrooms, petrol stations, etc. – can help to overcome the suburbanisation of parts of the high street, but such schemes are difficult to achieve because of the commercial success of such formats, driven by the availability of large areas of free car parking. Nevertheless, opportunities exist to intensify uses on the spaces around such developments, and to reconfiguring sites to achieve a better integration with the high street on the back of a more efficient design.

c. Redevelopment of residential areas, will provide some of the greatest challenges, but low density residential neighbourhoods or inefficient post war housing estates were found close to and on a number of the high streets. In such places, the spaces between buildings were often uncared for, whilst the developments themselves created a poor edge to the high street. If ownership constraints can be overcome, and community concerns handled sensitively, it may be possible to upgrade housing and deliver a better high street environment at the same time.

Collectively, the opportunities for redevelopment are substantial, although few will be straightforward, and many will require public sector intervention to bring forward sites that the market will be unable to compile or remediate on its own. The benefits are potential win / win scenarios, contributing to the collective good of the high street, whilst also delivering viable new development opportunities. Physical, practical and legal constraints will be significant, but such opportunities will gain from access to a ready market in the form of an existing community, proximity to good public transport and a full range of existing services and amenities, and the presence of strong character and sense of place which developments can enhance.



Vacant gap site, Tottenham



Underutilised industrial land, Tottenham



Derelict shop, Redbridge



Derelict market building to rear of high street, Wembley



Superstore car park, Redbridge



Large site under demolition, Ealing



Re-use of old bingo hall as apartments, Streatham



Car park, Wembley

4.4 Exchange issues

4.4.1 Socio-economic context

In common with high streets across London, the six case studies varied in their socio-economic profile, although with a bias towards the less advantaged end of the spectrum. Nevertheless, as argued in 3.3 (above), the socio-economic make up of a high street's catchment is likely to dictate the real estate (particularly retail) profile, as well as the types of exchange opportunities available there, although not entirely. Thus Ealing, for example, with clearly the most advantaged socio-economic profile, also had the most charity and pound shops (see 5.3.2), and also, the joint highest number of betting shops (with Streatham and Tottenham), although the lowest number of pawn brokers / money agents.

In fact, drawing on 2009 Experian data (<http://cdm.mimas.ac.uk/experian/>) for population and household income for a 400 zone catchment around each high street, it is possible to identify three clear income bands, with Ealing at the top (Median 2009 household income at £38.5K), Streatham, Wembley and Redbridge in the middle (between £31 and £28K), and Peckham and Tottenham clearly at the bottom (between £23 and £21K)⁴. Indices of multiple deprivation demonstrate a similar picture, although with Tottenham showing by far the most extreme deprivation (<http://www.communities.gov.uk/>).

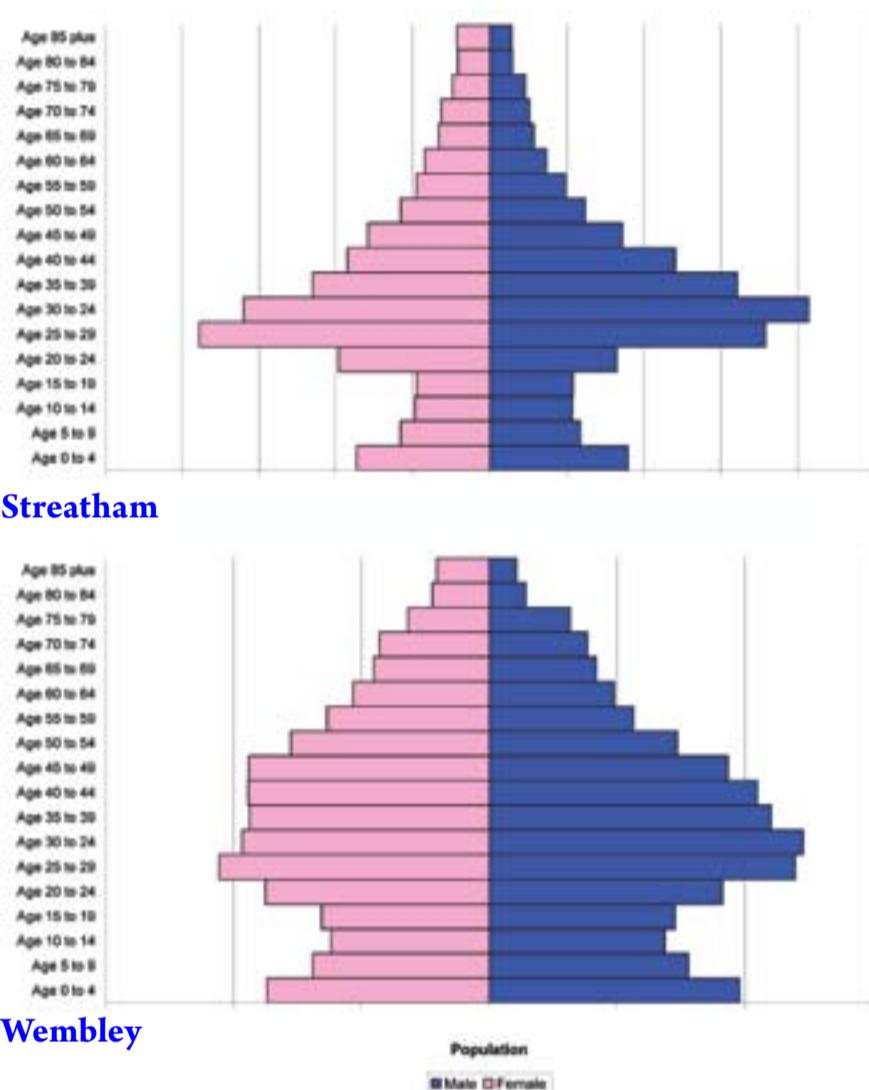
By comparison, demographically, two clear profiles are apparent. Four high streets show a reasonably balanced profile, with roughly equal numbers of middle aged and younger adult occupiers, a gradual drop off into old age, and smaller numbers of children, although a growing population in the 0-4 category. By contrast, Ealing and particularly Streatham show much larger numbers in the younger adult 25-29 and 30-34 categories, then a sharp drop off into middle age categories, and (in the case of Streatham) into old age as well. Surprisingly, these profiles also show reduced numbers of children, perhaps suggesting that these more wealthy populations (Streatham was second to Ealing in this regard) are also more transient, and able to move further out into the suburbs or out of London all together as they start families.

see demographic profiles (right)

The nature of the 'yuppie'-type retail offer in Streatham (see 4.3.2), would seem to confirm this, as does Experian's geodemographic categorisations (<http://strategies.experian.co.uk>) which show the high proportions of young upwardly mobile and more transient groups in both areas, whilst the remaining high streets are dominated by high immigrant populations (strongly Asian in Wembley and Redbridge and Afro-Caribbean in Tottenham, the latter helping to explain the higher incidence of butchers in these high streets). Many of the streets relate to multiple communities and ethnicities and so it is difficult to define the areas, which relate to particular social groups. Peckham serves as a particular example. Hall (Hall, S...) comments on the multi ethnic street of Walworth Road in London (which shares characteristics with Peckham) and has developed ways of capturing, "the composite and shifting relationships between individuals and groups", with respect of the life of a high street.

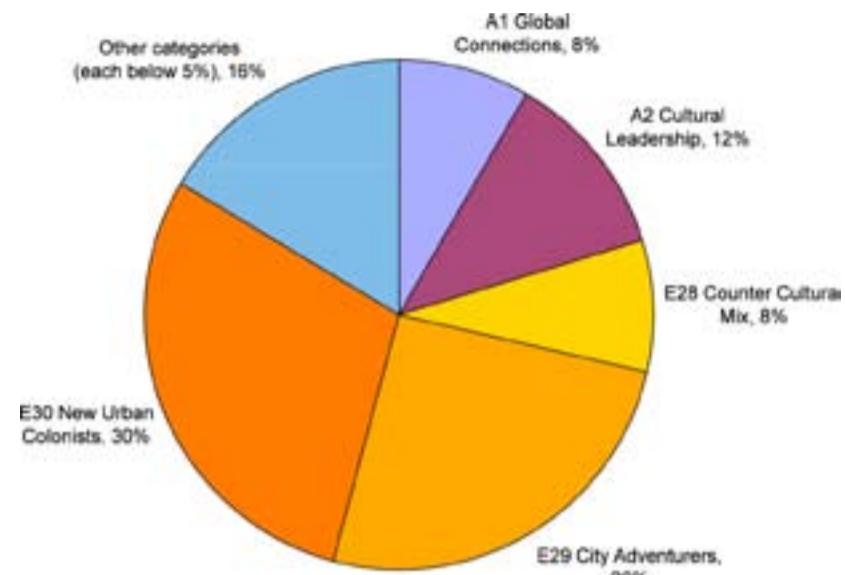
These finding emphasises the importance of carefully getting to know the existing communities and catchment profile before embarking on initiatives to change the nature of a high street.

see data (top right)



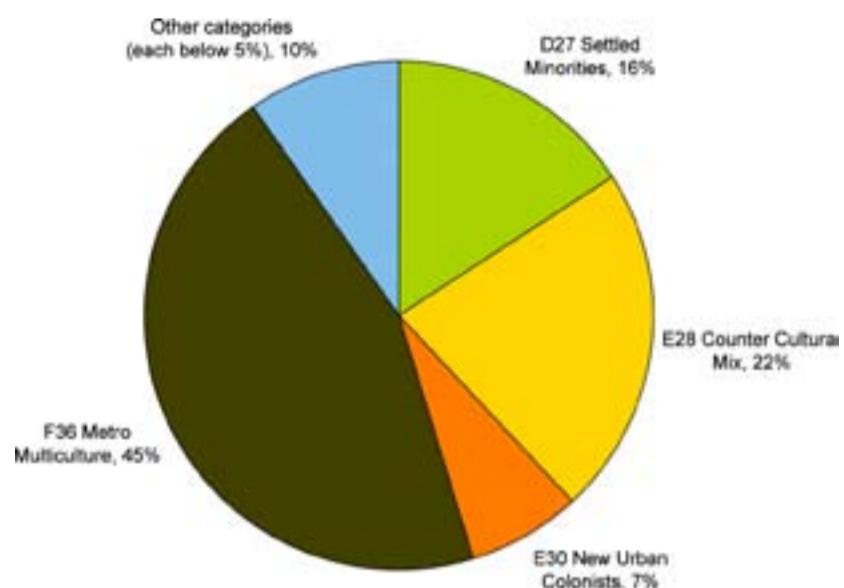
*Above: Population demographics for case study high streets STM and WEM
For lower super output areas falling within 400m of the high street*

⁴Using the same data, average median household income across London, weighted to take account of the different numbers of households in different lower super output areas, was £31K in 2009.



Ealing

Main Experian Mosaic¹ geodemographic categories



Peckham

Main Experian Mosaic¹ geodemographic categories

Indices of Deprivation (source Department of Communities and Local Government)²

Above: Pie charts showing Main Experian geodemographic categories
Data is for the 36 Lower Level Super Output Areas falling wholly or partly within the zone 400m from the High Street.

4.4.2 Businesses and employment

Drawing from the Office for National Statistics Business Inquiry it is possible to identify the numbers of business and employees in the lowest Super-output areas in which each street sits. The analysis demonstrated that Ealing has the largest number of businesses and employees whilst Redbridge has the smallest number of businesses and Streatham the smallest number of employees. The analysis confirms the discussion above about the nature of employment opportunities and retailers on the streets (see 4.3.1 and 5.3.2), notably the presence of many large multiple stores in Ealing, as well as a substantial office base, the presence of smaller numbers of big box stores in Redbridge, and the presence of a large number of smaller units in Streatham. In the case of Tottenham, the figures are distorted by the presence of larger institutions and colleges, as well as by industrial areas on and adjacent to the street.

see data (below left)

The analysis is valuable because it suggests that despite the justification of big box retail on the grounds of the employment opportunities it presents, in fact, the encouragement of smaller scale retail may lead to greater local employment opportunities. In the process it will also allow opportunities for a greater diversity of other employment types to flourish, for example office and service employment, with the knock-on multiplier impacts this may have on high street vitality. This also potentially makes the high street more resilient to changes in the market.

Across the 6 case study streets,
the average number of employees
per business was just...

8.6

The smaller scale of businesses (average 8.6) on the surveyed high streets is very significant in the light of research by Glaeser et al at the National Bureau of Economic Research in USA, who assert that an abundance of small, independent firms is one of the best predictors of urban growth.

"Average firm size and the growth of establishment in new firms are extremely highly correlated, across cities and industries, which suggests that both are capturing something like entrepreneurship", and, "The big fact about entrepreneurship and cities is that average firm size strongly predicts urban success."

There is therefore emerging evidence to suggest that supporting and nurturing London's smaller businesses, and the environments in which they flourish, may have a positive impact on the wider economy.

High Street	Total Businesses	Total Employees	Average (mean) Employees per business
Ealing	2,700	22,800	8.4
Peckham	2,100	13,400	6.4
Redbridge	1,300	13,000	10
Streatham	1,700	11,300	6.6
Tottenham	1,800	20,800	11.6
Wembley	1,600	14,300	8.9

Table: Number of Businesses/Employees on the Case-Study High Streets:

4.4.3 User patterns and perceptions

An on street survey of high street users in each of the six locations of 181 users in total revealed a wide range of reasons to visit the high streets, but also some stark differences between the case studies. Thus whilst overall figures across the high streets suggested that over a third of visits are primarily made for shopping purposes⁵, this varied dramatically between Ealing, where 56% of users visit the street primarily for this purpose, and Streatham where the figure fell to just 12%. In Streatham, a large proportion of users were simply passing through (19%) or catching public transport (16%), whilst both in Streatham and (in particular) in Peckham (27%), the street was seen as an important social resource, and a place to meet family and friends, something that did not feature at all in the responses given in Ealing.

Refer to chart (right)

The high street as workplace was the second primary reason given across the six streets for visiting, with, again, Ealing scoring highly in this category (37%), as did Wembley. Leisure was the fourth most popular primary reason for visiting high streets, after meeting with family and friends, with Peckham scoring well here (21%), perhaps pointing to the impact of the leisure centre and very successful Peckham Library. Passing through scored next most highly, then attending or collecting from school, a category in which the presence of schools and colleges on Tottenham High Road and in Redbridge led to a high scores (11 and 10% respectively). In Redbridge, the presence of a church, mosque and Sikh temple may explain the 10% of users visiting primarily for other civic purposes, buildings which are used for a range of other purposes as well as for worship.

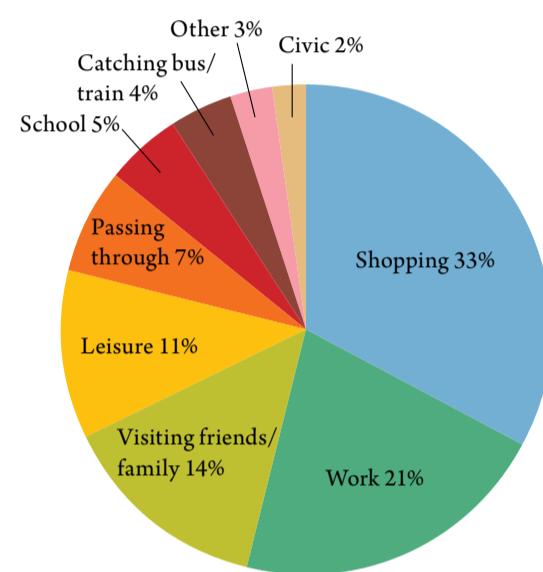
Across the high streets, what is apparent is how much these streets are used for purposes other than retail, indeed in this survey, two thirds of trips were made for such purposes. In addition, despite its relative poverty, Peckham demonstrated how high streets, if conducive, can be important social places. By contrast, if not conducive to such activities, despite an affluent clientele, high streets can discourage social activities, and instead become mere functional places for only 'necessary', rather than 'optional' activities (see 2.4.1). In such places, trips are likely to be shorter and less amenable to multiplier activities than would otherwise be the case, or may be abandoned altogether in favour of more welcoming environments, perhaps away from a high street.

Overall perceptions of the high streets varied. In Ealing, users complained that the street was congested and difficult to use, with the pavements squeezed because of the traffic, visits were often short and uncomfortable, and the quality of shops was perceived to be suffering as a result. In Tottenham, concerns focused on perceptions of crime and a lack of safety due to the high levels of traffic on the street, but also that in such a long street, different issues were apparent along its length although generally it offered much to local users. In Streatham users felt very strongly about their high street, but most people spent less than 15 minutes there per visit, whilst in Peckham, the nature of the street as a social space was highly valued and almost two thirds of its users visited the street at least three or four times a week.

More detailed interviews with users of the high streets in, for example, Redbridge, reveal a sense of high streets that have changed and that are changing, with some disquiet amongst long established residents and businesses that the traditional high street and the monolithic community of residents and tightly knit group of business that it served has disappeared. Separately, however, there is a sense of a new home being shaped for and by the new communities that have moved in to the area, who favour particular and different local facilities that cater to their needs: places of worship, shops serving ethnic foods, culturally specific restaurants, etc. Therefore, although one type of more homogenous high street may have disappeared, in its place a new more complex high street has emerged, used in different ways by different groups, with different networks and associations (personal, cultural and business) who may have little to do with each other beyond their presence in

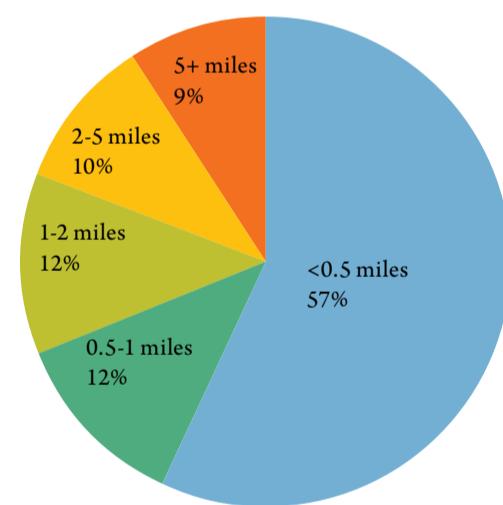
⁵This compares closely to the latest figures on London-wide trips, which show about 28% of all London trips are made for the purpose of shopping or personal business (excluding leisure) (TfL 2010: 73).

the same space. Thus signs of decline for one group may be signs of life and vibrancy for others. Under the surface there may be far more going on than at first sight may seem to be the case. A key challenge may be to find ways to involve the range of different user groups and communities in discussing the future of their high streets in order to understand the nature of common problems and potential solutions.



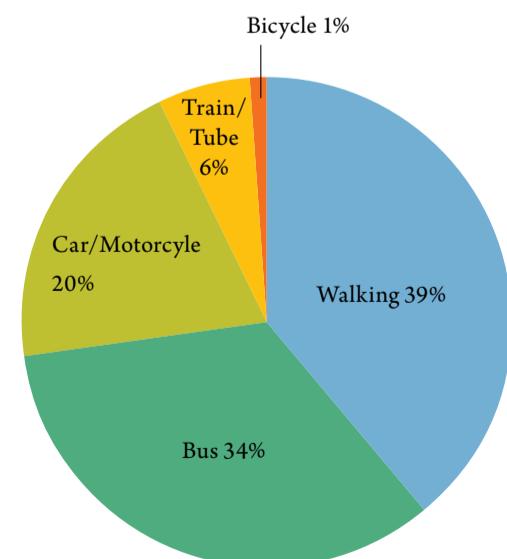
Primary Reason for visiting the High Street:

taken as a total average of interviewing 181 people on the six case study High Streets



Distance the person lives from the High Street

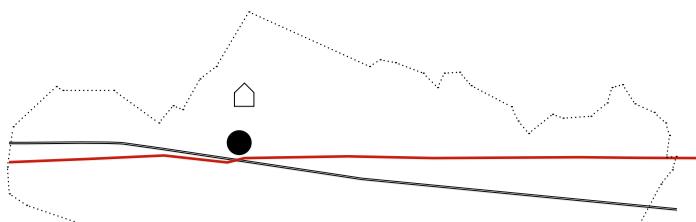
Taken as a total average of interviewing 128 people on four of the case study High Streets. Peckham, Redbridge, Streatham and Tottenham



Primary mode of transport to reach the High Street

Taken as a total average of interviewing 114 people on four of the case study High Streets. Ealing, Redbridge, Streatham and Tottenham

Pie charts showing summary of on-street surveys



Ron Croucher

Owner of P.G. Creeds & Son.

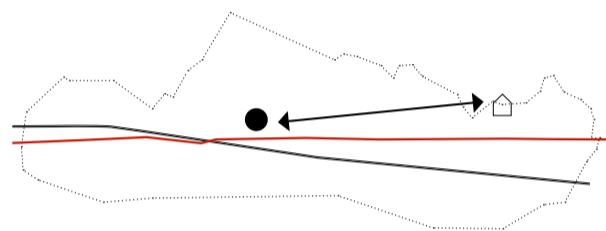
Lives: In locality

Conversation at P.G. Creeds & Son, Seven Kings

"Creeds has been in Seven Kings since 1904, I haven't been here quite that long, but almost!" Ron has been at the shop for 52 years. He bought the shop 25 years ago from Mr Creed. "Business was strong then, we were part of a group of shops here at Seven Kings, there were well used by the community- green grocers, butchers, fabric shops etc.."

According to Ron there used to be a very strong community and connection to the High Street "You could barely walk down the road without bumping into people you knew, and all the shop owners knew each other" - though this is certainly no longer the case- "Very little going on, doesn't have much to do with the other shops in Seven Kings, the community has changed - main changes are the number of bed sits and everyone using their cars." He does however enjoy working, despite the hard times, and does know the majority of his customers - many by name.

Has been to the T.A.S.K. (Take Action Seven Kings) group meetings, though not regularly any more.



Ali and Jusnai Uddim with chills Hannah.

Music Producer (Dj Name 'Daft') and housewife

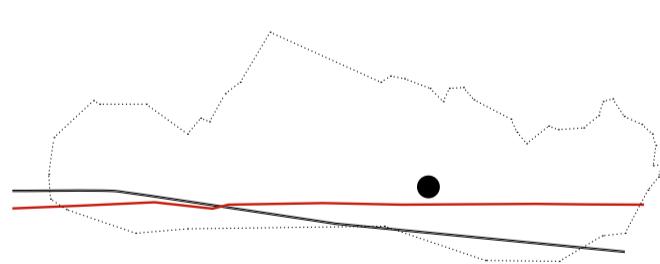
From Portsmouth and Aberdeen originally, now live in Goodmayes.

Conversation at Seven Kings Cash & Carry.

"Yes, we would definitely say there is a strong community in this area, there is a good vibe to the place"

They say 'Foxy's' Halaal shop is one of a few important informal meeting place of their community. "We all know Foxy"

Ali explained that he lived in central London in his 'wilder' youth (he used to be a dancer at the Ministry of Sound) before his marriage to Jusnai. They chose to live in Redbridge as work keeps them in London and there was a strong existing Bengali community and they were made to feel very welcome. A lot of people have begun to move here from Brick Lane as that area has changed. There are only a few specific places along the High Street which they use regularly: The Mosque in Romford, Foxy's Shop and occasionally the Mirj Masala Restaurant although; "We don't go out much now... the Asian communities are very family orientated and will take dining at each others houses very seriously.. although there is not that much for the Asian youth who all go out in Ilford, or Central London – the Trocadero."



Swarn Singh Kandola

President of Goodmayes Gurdwara

Conversation in his office.

"Gunji's addit is to recognize the human race as one, as such this all Gudwaras are open to all, although it is mostly sikhs that use the facilities here. Around 3-400 come to prayer and eat every day and on New Years day we have around 5,000 to pay their respect in the upper hall."

The building, an large adapted industrial 3 storey warehouse, houses prayer rooms, offices, meeting rooms, a canteen and a gym. The gym is very popular with the younger Sikhs of the community. The building is used for many events by the large Redbridge Sikh community, from meeting for a chat to weddings. He explains that they have committee meetings every week and have a good relationship with Redbridge Council.

When asked where else the community meets he explains there are around 30,000 sikhs in the area. In the summer they hold an annual sports weekend in Goodmayes Park, up to 10,000 attend. Saturday is football for the youngsters, on Sunday is Kabaddis for adults.



above: South Redbridge High Road; local conversations.

For more examples refer to appendix H

4.5 Movement issues

4.5.1 Traffic

Traffic counts on the high streets revealed huge swings in traffic numbers depending on the time of day. For example, counts in Peckham ranged between 250 and 1140 an hour in one direction on Peckham High Street and just 100-150 on Rye Lane. Significantly, where the lowest vehicle counts were recorded, pedestrian counts were generally higher, with Wembley recording the highest pedestrian counts of in excess of 2,600 in one direction, recorded at lunchtime, and matched with a relatively low traffic count (at the time of 480 vehicle in one direction, per hour).

All of the case studies exhibited times when at least part of their high street environment was very busy, with some never dipping below the 1,000 cars in one direction an hour, including Redbridge and Ealing. Unsurprisingly the Detached high streets recorded less vehicle movements, and thereby offered much less traffic dominated environments to pedestrian users of those streets.

4.5.2 Travel

Travel patterns to the high streets were surveyed, with 128 users surveyed across four high streets: Peckham, Redbridge, Streatham and Tottenham. These revealed that the large proportion of users of the high streets lived within a very close catchment, with about two thirds of users coming from less than 1km away, and less than 10% journeying further than 8kms (5 miles). Noticeably, this percentage was much higher for Redbridge (22%), where the big box retail seemed to attract a car-borne clientele from a much wider catchment.

Modes of travel were also surveyed, in this case of 114 users across the Ealing, Redbridge, Streatham and Tottenham high streets. The survey revealed two dominant modes of transport: walking and public transport, and with approximately 39% travelling on foot to their local high streets, and a further 40% by public transport. Of the remainder 20% travelled by car or motorcycle, with just 1% opting to cycle. In this case Streatham recorded by far the highest level of walking (63%) and Ealing the lowest (14%) which by contrast recorded by far the highest rates of public transport use, at 65%. Redbridge, again reflecting its big box retail offer, recorded the highest car-borne travel, although still only at 25%.

The travel patterns suggested that contrary to expert views covered in the literature (see section 2.4.3) it may be that it is the experience of dominant pedestrian and public transport user groups that needs greater consideration and improving, rather than necessarily the provision of more parking for the smaller numbers of car-borne users.



Overcrowded pavement by bus stop. Peckham



Wembley

4.6 Management issues

4.6.1 Day to day management

The quality of day to day management of the high streets was perceived to be problematic across the high streets, despite the considerable investment in, for example, controlled parking schemes, CCTV, traffic / pedestrian separation measures, signage and street furniture, etc. In particular streets were perceived to be dirty, too often dominated by rubbish, generally uncared for, and managed for the convenience of traffic rather than pedestrians. Ealing represented a typical story, where no Town Centre Manager was employed by the council, and instead disparate departments of the Council were responsible for management tasks that included:

- Refuse collection
- Parking
- Traffic management
- Graffiti removal
- Street cleaning
- Management of trees
- Road and pavement repair
- Parks and open spaces
- CCTV

The result was a poorly coordinated and piecemeal approach to the street that exacerbated the sense of decline. In 2006, in an attempt to overcome this, the local businesses has set up the Ealing Broadway Business Improvement District (BID), and this is now attempting to fill the gap; although primarily from a business perspective, rather than necessarily for the greater good of the range of high street users.

4.6.2 The planning framework

A review of local planning policy for the six case study streets reveals a common desire to protect and enhance the high streets, but also some realism about the competition they face, and the unlikelihood of ever being able to return to the high streets as they once were. Policy was found in a combination of Local Development Framework Core Strategies, and specific Area Action Plans. It argues on the one hand for bringing forward of specific proposals such as 'Destination Streatham' (a new ice rink and swimming pool, with associated housing and supermarket) to boost the attraction of high streets, and on the other for better protection of what already exists. The latter includes revealing the historic facades and reinstating shopfronts at Peckham, or protecting against further conversion of buildings to drinking establishments or fast food takeaways at Redbridge.

In order to bring forward more considered strategies, masterplans are proposed at Streatham and Wembley, with an ambitious plan proposed for Wembley to grow its retail offer in order to become Brent's pre-eminent retail centre. The Borough is actively encouraging multiples to the area, in contrast to Tottenham, where policies are emerging from Harringey to retain the vibrancy and character associated with small independent shop retailing, in the light of a perceived threat towards fewer, larger units. In this, the powers of the Borough are perceived to be limited, although proposals include giving encouragement to retaining small shopping units, and using legal agreements wherever possible to secure a levy from major retail developments in order to support independent retailers in the vicinity.

With the exception of Ealing's Area action Plan that proposes exploiting the large open green spaces round the Broadway in order to provide a stronger sense of character, there is a notable absence of policy that engages with the unique selling points of the various streets, or seeks to find means to differentiate them and their offer from the competition. This is manifested in an absence of vision, and in broad aspirations, rather than specific proposals for change.

4.7 Propositions for change

(Refer also to appendix I)

With the range of physical, real estate, exchange and movement issues varying from high street to high street, so will the qualities, problems and opportunities they present.

As an extended case study and part of this study, Gort Scott produced a set of propositions for LB Redbridge, to act as part of the Evidence Base for their emerging Area Action Plan. This report, called "Crossrail Corridor, High Road Opportunities: Places, people and connections" outlined a series of deliverable projects under four headings: Accessible amenities, Quality public realm, Movement and connections and Opportunities for community.

As a part of this research project the teams of UCL students also had the opportunity to present propositions for change in each of the high streets as did Gort Scott for Redbridge specifically. These ranged from the dramatic to the prosaic, but collectively suggest the types of interventions that may be possible in the future. They can be categorised as follows:

Redbridge:

Plan of proposed interventions identified by L.B.Redbridge and Gort Scott and example project: Temporary library within vacant shop.



Physical fabric:

Distinctiveness initiatives

- Reveal heritage where possible
- Provide loans to upgrade shopfronts on the basis of adopted design guidance
- Enhance character through public art, landscaping and opportunities for new landmark buildings
- Encourage un-blocking of shopfronts to create display space and active frontages
- Consider the parts and the whole, and whether the parts have their own distinctive characters and/or role.

Public realm

- Distinguish high street through road surface colour and texture
- Adopt consistent, simple and high quality public realm treatments: paving and street furniture

Trees and soft landscape

- Protect street trees and introduce or replace where required to soften the landscape and filter dust
- Introduce seasonal colour and texture through planting

Lighting strategy

- Replace roads-based lighting with pedestrian focused lighting schemes
- Floodlighting of landmark buildings and creative lighting to enhance evening economy

Real estate:

Vacant properties initiatives

- Actively encourage temporary uses in vacant buildings
- Compulsory purchase derelict buildings and land and support site assembly
- Introduce living over the shop grant and advice regime

Intensification and redevelopment

- Grow high street catchment by prioritising sensitive new development along and around high streets
- Actively compile sites to facilitate redevelopment
- Encourage re-use of large sites for temporary purposes e.g. markets, events, exhibitions, etc.

Retail diversity

- Protect diversity through local 'well-being' powers (e.g. purchasing threatened local businesses) and planning policy
- Encourage street markets and mini-markets
- Introduce advice service for small businesses

Big box initiatives

- Redress relationship to the street, through major redevelopment or wrapping schemes
- Radically improve access for pedestrians, cyclists and those arriving by public transport.
- Only allow new big box developments if sensitively integrated behind a high street facade

Exchange:

Green and civic spaces

- Upgrade quality of neighbouring green spaces and remove barriers to integration with high streets
- Consider opportunities for new incidental / civic spaces and pocket parks, e.g. reclaiming road space at junctions / side streets
- Encourage shops, cafes and restaurants to spill out onto street space

Crime initiatives

- Dedicated street wardens to reduce anxiety
- Encourage Trader watch schemes
- Encourage family-based evening economy uses

Civic uses

- Resist pressures to consolidate and relocate civic-type functions to off-high street locations
- Consider opportunities for new high street based civic uses e.g. libraries, idea stores, citizen advice, housing / payment office, leisure facilities, etc.

Public toilets

- Better manage existing facilities
- Open new high quality, accessible public toilets

Management

Community engagement

- Facilitate community consultation and research to properly understand different communities and users and their long-term needs
- Consider community based art and other engagement initiatives

Day to day management

- Introduce town centre management to better coordinate management roles and responsibilities
- Encourage BIDs schemes to raise additional resources for management
- Invest in long-term maintenance
- Better control and coordinate waste disposal and removal
- Prioritise everyday cleaning, cleansing and maintenance
- Consider better marketing, for example through a dedicated website, events and activities
- Encourage shop owners or residents to adopt benches, flower beds, etc.

Movement:

Traffic calming

- If possible, divert through traffic to bypass roads
- Where possible, make high streets 20mph zones
- Where appropriate, adopt naked streets principles, to encourage changed perception of road / pedestrian balance
- Introduce super-crossings, allowing diagonal crossing at junctions

Improved pedestrian experience

- Adopt shared space principles where possible off the main high road run
- Widen pavements where congested
- Remove street clutter and barriers to allow pedestrians to move more freely
- Improve way-finding e.g. adopt legible signage
- Where poor, enhance connectivity between the high street and its hinterland

Public transport improvements

- Upgrade bus shelters
- Relocate stops to avoid pedestrian / bus congestion
- Allow space for bus pull-ins
- Enhance interchange spaces and routes between high streets and stations

Cycle network improvements

- Link up cycle network to stations
- Introduce continuous cycle routes along high streets
- Upgrade cycle parking

Pollution

- Treat road surfaces to reduce particulates
- Carefully control new higher building proposals to avoid canyon-type effects
- Reduce traffic loads and speeds

LDA Case Studies

There are a number current and completed high street projects led or steered by LDA and Design for London, examples can be found in Appendix I. Key delivery partners for these projects include the HCA, TfL, boroughs, sub-regional and local partnerships and town centre forums. The aim has been to align the homes growth, transport and economic development functions and priorities for the various functional bodies more strongly.

LDA steered projects. Uxbridge High Road. East Architecs and below HS2012. Fluid.



HS2012



vision_1: vision & delivery

4.8 Conclusion, what is the potential?

London's high streets reflect a wide range of types. Outside the Central Activities Zone (CAZ), the differences between morphologically 'Connected' and 'Detached' high streets is particularly significant, as is their distance and geographic position relative to Central London, and the strong associations this has with their socio-economic context. Choosing six detailed case studies on this basis and subjecting them to a range of detailed analysis revealed much information about the potential of London's high streets.

The physical structure determines their likely patterns of use, with shorter and fatter detached high streets resembling traditional more homogenous town centres, whilst the longer and thinner connected streets are often made up of a series of connected parts, each of which is likely to be used in a different manner, by different groups of users, and should be managed with these patterns of use in mind.

A characteristic of the urban blocks that front onto high streets is a huge diversity in their physical form and the land uses they house. Hidden behind the high street facades is a bewildering array of activities that feed off each other and the high streets, and which in turn help to fill it with life. Thus retail uses typically only account for 60% of the non-domestic uses in and around the high streets. This diverse crust of activity is usually one block deep along the high streets, and potentially very vulnerable to the threats that face high streets. It should not be sanitised in a headlong rush to 'regenerate' or 'regulate' high streets, but should be nurtured as a source of employment and great vitality that goes some way to explain the impressive employment figures associated with London's high streets. The benefits to the economy that the typically small scale of high street businesses can bring should also be recognised, valued and promoted.

At same time, the integrity of the high street building line should be promoted, with new development required to respect or repair this as a basic urbanistic parameter. In general buildings and public spaces should face the high street and be directly accessible from it. This structure allows for both continuity (on to the high street) and change (within the block), and therefore for great adaptability over time. It is far more important than the architectural quality of the buildings, whilst rationalisation of the public realm can be used effectively to enhance overall visual quality, and freedom of movement.

Retail is clearly critical as part of the high street mix, and London high streets often possess their own particular mix of retailers, providing very distinctive characters in the process. The analysis suggested that outside of the major town centre locations such as Ealing where high rates and rents seem to restrict the offer to the national chains, high streets have been highly sensitive to the different local communities they serve. Across the sample, independent retailers had increased in number by 20% since 1971, and the absence of the chains in less prosperous areas, has allowed new independent retailers to spring up to serve the new tastes of their now culturally rich communities.

The high streets were replete with development opportunities, including the re-use of underutilised buildings (large and small), development on underutilised and vacant land that often fell within the hinterland of the high streets, and development through the intensification of existing uses. Unfortunately, many of the larger opportunities were not straightforward, requiring public sector initiative, powers and resources to bring them to the market, although with the win / win benefits described in 3.8 (above): the development strengthening the high street catchment, whilst itself benefitting from the amenities that the high street already has to offer.

Analysis of the demographic profiles of each high street demonstrated how some high streets have become associated with certain age groups and 'types' of users e.g. Streatham's strong association with upwardly mobile younger adult groups. Such analysis provides a clear hook on which to hang any emerging strategy for the future of such a high street (playing to its strengths). It also demonstrates how high streets change and adapt over time, and that this needs to be understood and accepted by those seeking to influence their future direction. It also leads to very different patterns of use, with the research demonstrating that retail is not the primary reason for many high streets to exist (two thirds of visits are not for that purpose), and that other forms of exchange activity may be equally or more important reasons, or simply that the high street provides the best route to get somewhere else.

The research demonstrated the vital importance of high streets being conducive to a wide range of social and civic activities, and when they were not, they suffered as a result. A key finding, however, was that many high streets no longer serve a homogenous community, but may serve many different communities, who all use the high street differently and have different perceptions of it, from a sense of loss and decline, to perceptions of renewal and vibrancy. A key challenge for policy makers will be to understand and engage these different user groups in the future of their high streets.

The biggest long-term threat to high streets is traffic. Where traffic is high, a corresponding drop off in pedestrians is recorded and this will have profound negative implications for retailers. Detached high streets have the advantage here over their connected counterparts. In this regard, it is noticeable that the vast majority of users are local to the high streets surveyed, and choose to travel by public transport or on foot; the very essence of a sustainable movement framework. In this regard, the great concern for parking and the needs of car-borne users may be overstated in the literature. In all the high streets analysed, a clear finding was the need for a better balance to be struck between the exchange and movement functions of high streets.

In management terms, high streets still suffer from the classic fragmentation of responsibilities that typifies the response of the public sector to urban management, with resources that are available being steered primarily to the needs of traffic, rather than pedestrians. Policy for the six high streets was largely aspirational, and failed to engage with the high streets as unique places with their own character and set of opportunities that could be exploited to secure their place in a busy market. The over-riding impression is of a laissez-faire approach to high street management, and of failing to engage with these important assets in a proactive way. This contrasts strongly with the range of possibilities that might be on offer if the high streets were thought about, perhaps for the first time, in a more holistic and positive manner (see 4.7 above).

05 How is policy facilitating the potential?

5.1 An absence of high street guidance



Jones et al (2007b: 7) highlight an historic vacuum in the area of mixed-use streets, stemming from the post-war pursuit of Modernism with its emphasis on land use separation and movement away from traditional street / block urban structures. In recent years, however, the issue of mixing uses has come back on to the agenda, including through public policy on urban design, sustainability, livability, social exclusion, and, of course, through the renaissance agenda inspired by the Urban Task Force (1999: 64-65). The Urban Task Force, for example, called for mixed-use neighbourhoods, and conceived of idealised pyramids of intensity that would converge on mixed use 'neighbourhood streets'. Beyond this, streets were largely discussed in terms of major roads and local residential streets (Urban Task Force 1999: 93), with no reference to linear, often continuous, high streets. Arguably, much higher density development has flowed from the drive over the past decade towards an urban renaissance, as has a strong focus on re-using brownfield land. However, this development has not always been linked to the sort of infrastructure, mixed-use environments and services that can still be found on and around most London high streets. A true renaissance might have exploited these existing assets to a far greater extent than has been the case in the recent past, and this potential still remains.

Although policy and guidance on wider town centres has frequently been issued, the most recent being *Looking After Our Town Centres* (CLG 2009a), dedicated policy or guidance on the specific role and issues associated with more narrowly defined high streets is hard to find. One of the only government guides to specifically bear the term in its title: *Investing in the High Street: Good Practice Guide* (DETR 1999) in fact uses the term in its wider sense to mean town centre retail, and includes remarkably similar, largely process-based, guidance to *Looking After Our Town Centres*. Under four headings it concludes:

- 1. Vision**
 - Every high street needs its own vision
 - High streets with a robust mix of sectors and uses will sustain investment
 - Good design and investment in the public realm attract private investment
- 2. Value**
 - Sustained town centre management underpins investment and builds confidence
 - Selective promotion of the high street develops identity
 - Fit for purpose public-private partnerships are a key mechanism for investment
- 3. Viability**
 - Nurturing local private business and investment leads to longer-term investment
 - Local authority leadership is vitally important
- 4. Vibrancy**
 - Lively, animated high streets attract investment
 - A quality transport offer leads to investment

The work concludes that although much emphasis has been on the larger centres, reflecting the vital role they play in sustaining local communities, secondary and tertiary centres also need to be nurtured. The guidance even argues that too much focus on large centres will further undermine the sometimes fragile existence of smaller centres (DETR 1999: 72).

Turning from guidance to policy, the following sections examine national and then London-wide policy before drawing out some common themes by comparing these policy levels with issues reflected in the local policy frameworks (see Appendix A).

5.2 National policy

5.2.1 Transport policy

Despite covering an area critical to high street success, the high profile Manual for Streets (DoT 2007) only extends to residential streets. The rather obscure document High Street Renaissance, Delivering – Renewing – Improving, partly redresses the balance. In this, the Department for Transport (2008) is explicit about the priority that should be attached to high streets, setting out the benefits of an ‘integrated enhancement’ of high streets, by which is meant schemes that together focus on traffic, street environment, safety, and the environmental and social benefits of regeneration. Based on evidence (see below), the DoT argue that such schemes involve major technical challenges and require significant political commitment, but have extensive benefits that include:

- Improved quality and stability for local traders
- Improved street environment and livability
- Significant road traffic reductions
- Improved facilities and safety for cyclists and pedestrians
- Improved personal security
- Regeneration of the local economy
- Development of local community activity and increased social capital
- Health benefits from increases in walking and cycling
- A stimulus to housing investment in the surrounding areas
- Improved accessibility to health care, education and employment.

Significantly, the DoT (2008a: 6) identify that local authorities are best placed to initiate and deliver high street improvements given their numerous overlapping responsibilities and interests that impact on such streets. Based on lessons learnt during their Mixed Priority Routes Demonstration Project they conclude that high street projects require a significant up-front investment in order to understand the nature of the problems facing particular high streets. As such they should seek to engage all stakeholders with an interest in the street, including the local community. To deliver, they suggest, will require careful project management, and usually an investment in enhancing project management capabilities of in-house teams before work can commence.

Lessons from the ten demonstration projects revealed that successful schemes require:

- Indicative costs from an early stage
- Identification and valuation of key risks
- Identification of appropriately skilled staff for each key element of the scheme
- Active engagement with other parts of the authority to get a better and more rounded solution
- Rigorous investigation of all potential funding sources
- A continual challenge to conventional thinking
- Clear and early decisions about space allocation
- Significant and on-going resource commitment.

Mixed Priority Routes are defined as streets that carry high levels of traffic and also have a mix of residential use and commercial frontages; a mix of road users, i.e. shoppers, cyclists, bus passengers, schoolchildren; and a mix of parking and deliveries: in other words, high streets. Extensive practical guidance is provided on how to implement such Mixed Priority Route Projects in Local Transport Note 3/08 Mixed Priority Routes: Practitioners’ Guide (Department for Transport 2008b). The document gives a ringing endorsement to such schemes, arguing:

“There are many benefits to be gained from enhancing the high street environment with an integrated approach. The investment is likely to contribute towards assisting the delivery of a range of local authority corporate objectives and targets including: accessibility planning; accident reduction; economic regeneration; Public Service Agreement; quality of life; and sustainability” (Department for Transport 2008b: 6).

5.2.2 Planning policy

Integrating a number of previous national policy guidance notes, the *Draft Planning Policy Statement 4: Planning for Prosperous Economies* focuses on the role of planning in securing the long-term economic growth of the nation (CLG 2009b). In this, town centres (rather than high streets per se) are seen to play an important role in driving economic growth and delivering local services. Developing a strong network of vital and viable town centres with distinct identities as important foci for communities is therefore prioritised as a focal point for offices, leisure, cultural, educational and community uses, as well as for retail. The policy acknowledges the need for a high quality public realm and for anticipating future growth that is integrated with the existing built fabric and public transport facilities. It further promotes the creation of more inclusive environments through better pedestrian and cycle linkages in order to achieve more sustainable development.

Draft PPS4 continues to supports a hierarchical approach to town centres, based on scale, size, sphere of influence, type, intensity and use. In doing so it stresses the need to identify through an “evidence based approach” deficient centres and to develop strategies for their regeneration (CLG 2009: 37). This might include examining levels of demand, vacancy rates, and the potential for development in town centres.

The policy encourages high density residential led mixed-use development within town centres and other places with good public transport accessibility, and intensifying retail, entertainment, and employment uses within and around the town and district centres. Somewhat in contradiction it also advocates retaining the existing character of town centres in terms of their built form, scale, density, function, use and layout. It further recommends support for animating town centres through encouraging an active evening and night-time economy, again whilst avoiding negatively impacting on the surroundings. In pursuit of all of this, the strategy retains the ‘sequential approach’ (CLG 2009b: 36), emphasising the importance of looking first for sites in existing town centres or on their edge, and only then looking for sites with good accessibility and connectivity outside centres. It also proposes regular monitoring of town centres to identify the need for moving a town centre up or down the hierarchy based on its performance and the need for future development.

5.3 London policy

5.3.1 Transport policy

In 2007 Transport for London (2007c) set out a vision for transport in London that included reducing the need to travel. This general aim underpins much of the subsequent policy in the emerging London Plan and the Mayor's Transport Strategy. London Living Streets (2008: 5) have commented that:

"Reducing the need to travel requires people to think and act more locally and demands neighbourhoods that have shops, services and employment within easy reach on foot"

The thrust of the Mayor's Transport Strategy (Mayor of London 2009c) aims to enhance capacity and connectivity in a fashion that is integrated with spatial development, encourages mode shift to cycling, walking and public transport, contributes to improving quality of life and environment, and improves opportunities for Londoners. In this the ability and potential of London's town centres to provide access to a wide range of services and their importance to achieving integrated transport and land uses is acknowledged, however, the need to strengthen the role of Outer London's town centres in London's economy forms the overarching objective around which the strategy is designed.

Explicitly addressing the urban realm, and reflecting discussion in section 2.0 (above) the New Transport Strategy emphasises improving streets holistically, not only to facilitate movement and provisions for freight and servicing but also as spaces that positively shape the cultural, social, political and economic environment of the city. Focussing on improving the image of town centres, especially in the suburbs, the intention is to achieve streets that are free from clutter, that are vibrant, attractive and enjoyable places to use, and which feature better air quality, bus service enhancements, smoother traffic flow, improved walking and cycling environments, and better integration of the transport system with the pedestrian realm.

New Streetscape Guidance adopted by Transport for London aims to put some meat on the bones of these latter aspects of the policy. It explicitly recognises that not all streets are the same, indeed amongst its core design principles is 'Recognition of local context and distinctiveness', including "not only the physical attributes of landscape and townscape, but also the activity, vitality and distinctiveness of the local community" (TfL 2009b: 4.3). In this, explicit reference is made to high streets as contexts requiring particular attention, and where exceptions to the standard palette of materials will be allowed in order to reinforce local character (TfL 2009b: 6.2). A series of Streetscape Character Types are identified, including 'Urban Civic, Retail and Commercial' streets that encompass both the Capital's prime retail locations and its typical high streets. For these types of streets, the guidance advocates simple traditional paving and kerbs, a rationalisation of street furniture and removal of obstructions, guardrails and clutter, and a general upgrade to street lighting.

The guidance falls into line with aspirations contained in the Mayor's recent policy statements on public space that advocate (amongst other things) public investments that contribute to revitalising and strengthening London's high streets, and generally rebalancing priorities on London's streets away from vehicles (Mayor of London 2009a: 13; 2009b: 4).

5.3.2 Planning and economic development policy

If transport planning in the capital is reflecting a major shift in emphasis towards a more holistic view of streets, planning policy relating to high streets remains largely unchanged in the latest version of the London Plan (Mayor of London 2009d). The Plan aims to realise the potential of London as a city of unique character with its distinctive network of neighbourhoods and town centres and further strengthen them for future development and expansion.

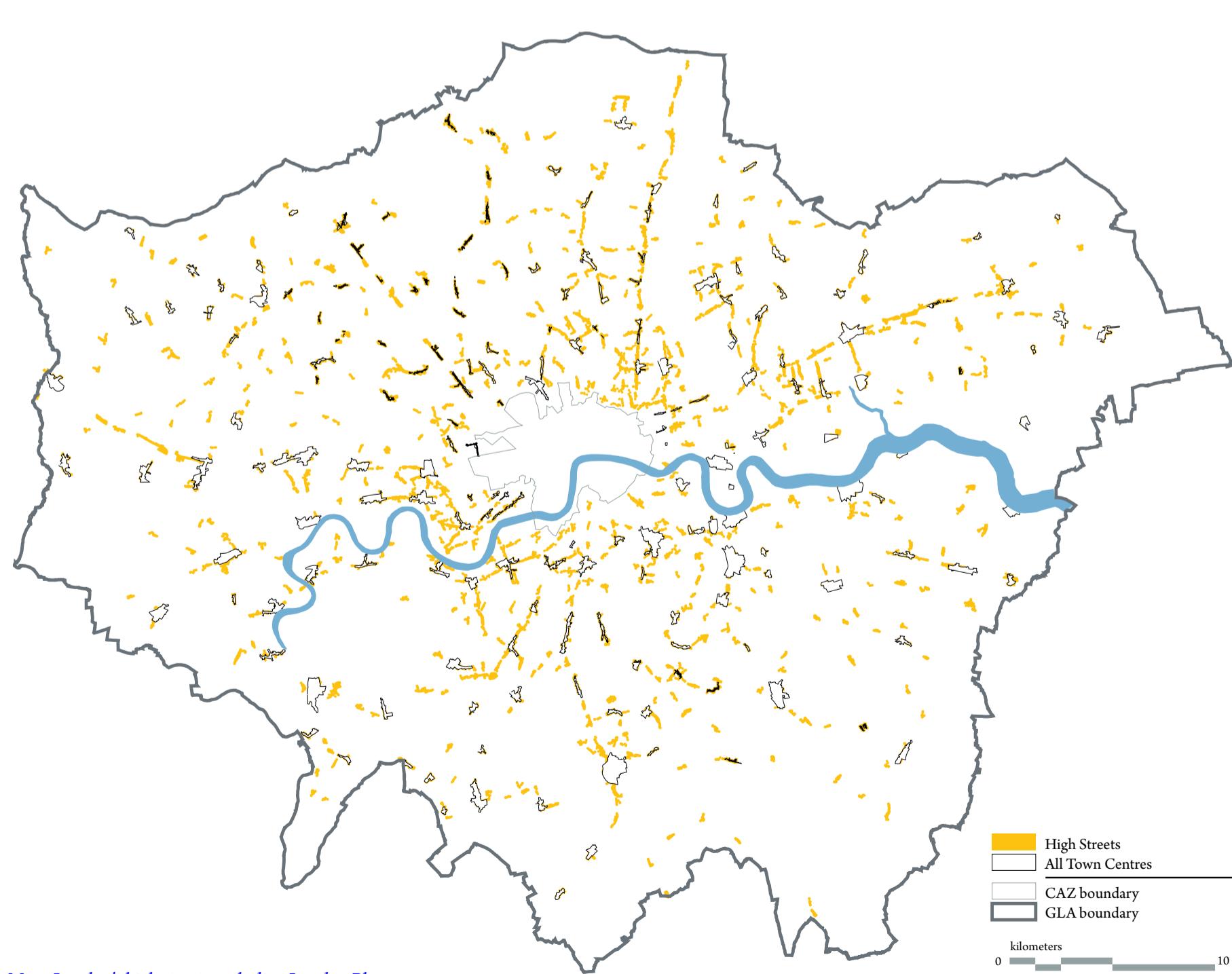
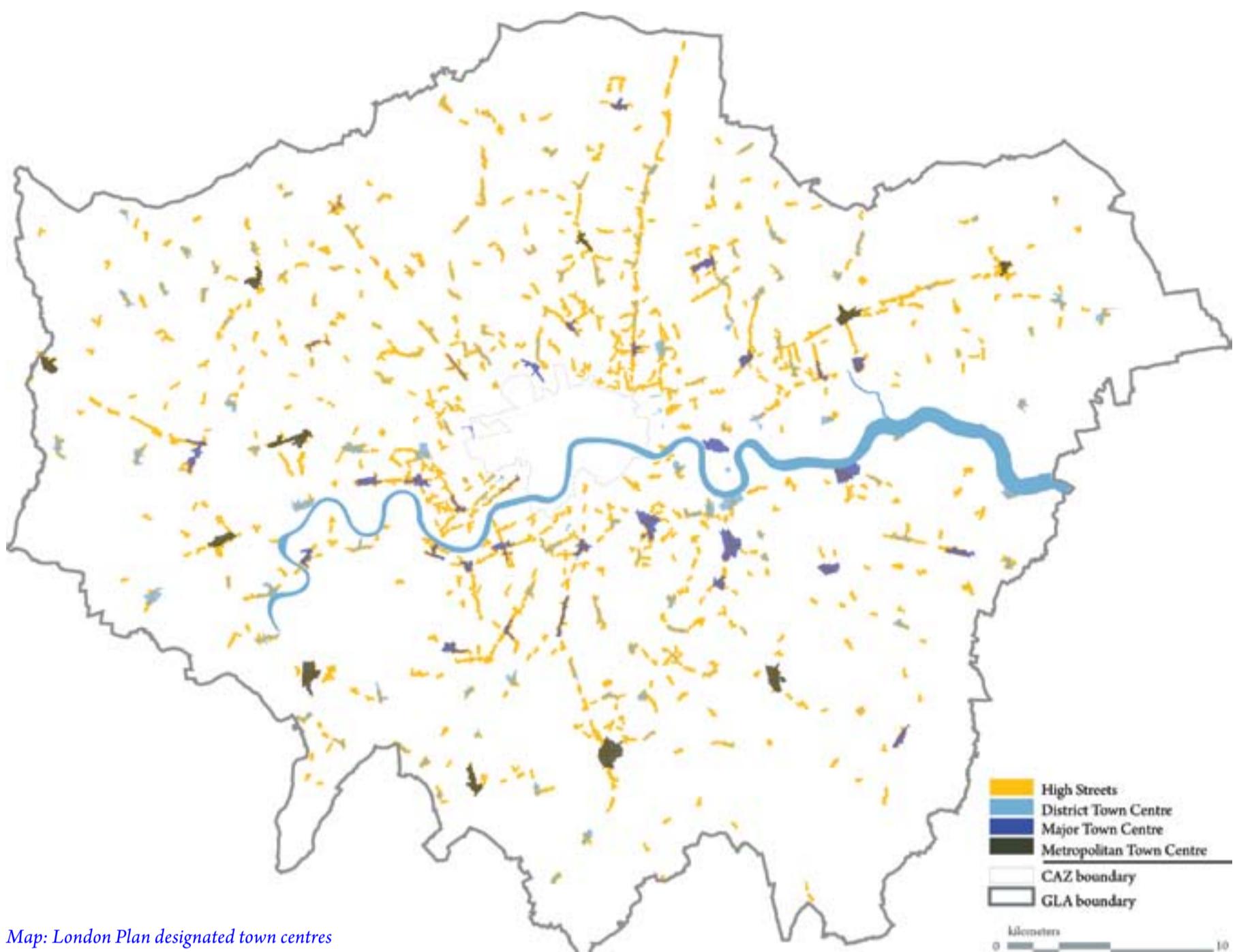
Noting that the city is a network of town centres derived from agglomerations over centuries, the plan envisages a polycentric spatial development model for London and a stronger and wider role for town centres including retail, leisure, housing, local services and job opportunities. London's town centres are a key spatial priority of the London Plan and are classified based on their contribution to the economy of London. While each centre performs a different function according to the community and area it serves, five broad types of town centre are identified in a notional hierarchy: international, metropolitan, major, district, and local and neighbourhood centres; the first four of which are designated in the plan itself.

It is therefore argued that the categorisation creates a strategic network of centres across the capital, providing in the process a framework to co-ordinate "appropriate types and levels of spatial development and transport provision" (Mayor of London, 2004: pp 133). Significantly, however, when the nine designated town centres that fall wholly or partly with the Central Activities Zone (CAZ) are stripped out and the remainder are mapped against the high streets identified and mapped in 3.2.2 (above), only 23% of these high street lengths falls inside of the designated town centres. The danger may be that by excluding the 77%, that they are thereby marginalised, both in London-wide policy terms, and in the way they are thereafter viewed in local policy or as opportunities for investment or public sector intervention. Conversely, it may be that it is in these areas that significant opportunities lie for a more sustainable form of development based around existing viable and functioning in high streets.

see maps (right)

The physical fabric of town centres that are identified is defined by regulating densities across the spectrum depending on whether they are located in Central London or in the suburbs and based on the sphere of influence of each town centre. Reflecting the density, the built form varies in terms of bulk and height, and reflecting principles laid down by the Urban Task Force (see 5.1 above), the plan proposes high density development within and adjacent to town centres, with the density decreasing with distance from the town centre. Spatial development is prioritised by integrating development with existing and future public transport infrastructure and services as well as by exploiting existing areas of good public transport accessibility.

Mixed-use development is supported in and around town centres, as is the rejuvenation of suburban town centres. Support is given to developing the creative industries and leisure infrastructure, including bars, restaurants and clubs that contribute to high value evening and late-night economies in town centres; strategies that are further supported in the recent Economic Development Strategy from the Mayor that anticipates the continued decline of jobs in manufacturing and the expansion of service and finance sector jobs. In this context the role of town centres is seen as critical in establishing a more competitive and innovative city (Mayor of London 2009e). In partnership with various stakeholders and agencies the strategy seeks to strengthen the economy across London with a major impetus on removing barriers to Outer London fulfilling its potential, and to supporting the development of town centres in Outer and Inner London as hubs for their communities and local economies.



Map: London's high streets excluding London Plan designated town centres

5.4 National to local

Comparison of national and London-wide policy against local policy in a selection of London Boroughs reveals a number of consistent themes. In this analysis the Local Development Frameworks of ten London Boroughs were analysed (see Appendix A):

1. London Borough of Barking and Dagenham
2. London Borough of Bexley
3. London Borough of Camden
4. London Borough of Haringey
5. London Borough of Harrow
6. Royal Borough of Kingston upon Thames
7. Royal Borough of Kensington and Chelsea
8. London Borough of Tower Hamlets
9. London Borough of Wandsworth
10. City of Westminster

The analysis reveals that all levels of policy identify town centres as the critical foci in the retail hierarchy with an important role to play in fostering economic growth and community development. Specific mention of high streets, however, is rare. With the exception of the City of Westminster, none of the London policy frameworks explicitly develop strategies pertaining to high streets in the sense of being the principle thoroughfare of neighbourhoods and town centres with their own particular pressures and potentials as discussed in sections 1.0 – 3.0 (above). Instead the wider concept of town centre inevitably shifts the focus of policy to major centres and away from local high streets.

Local policies typically reflect the national and London-wide view of town centres as major opportunity areas for land use and transport integration with significant potential for intensification and future growth. Policies advocate making efficient use of land by promoting higher density mixed used development and creating a well designed public realm that is safe and secure and attractive for walking and cycling. This is seen as desirable to enhance the quality of life of people and generate a feeling of community and social inclusion. At the same time policies promote a sensitive approach to preserving the identity and character of the historic urban fabric in such areas. Finally, by encouraging a variety of uses within town centres, animated street frontages and a vital night-time economy, policies promote the idea of town centres as venues for social, economic and cultural exchange.

An analysis of policy confirms that town centres remain locations in an abstract retail hierarchy, whilst the idea of high streets as real places has yet to be reflected in policy which typically still establishes a generalised framework for controlling development, rather than a vision to positively shape it. Although policies advocate a place-making approach to enhancing town centres, from PPS 4 to the range of LDFs they simply repeat the same sets of generic principles, and in the case of the LDFs offer crude land use allocations and basic transport proposals to back up the aspirations.

5.5 Conclusion, the need for new policy directions

The policy review revealed relatively little focused policy dealing with high streets. It revealed:

- That innovative thinking on the nature of high streets is coming from the transport rather than the planning or regeneration sectors, where the notion of streets as places is beginning to be reflected at national and London-wide level in emerging transport policy and guidance.
- In local planning frameworks, little evidence is apparent that high streets are a priority, or even that the nature of high streets in a holistic sense as advocated in the literature (see 2.6 above) is being reflected in actual place-based spatial visions for their future.
- Policy and guidance reflects many of the issues in the literature, but this is done in a manner that fails to interpret what the principles might mean for the range and diversity of London's high streets.
- Little evidence was found of a more holistic approach to managing London's high streets in a manner that would more effectively join up the contributions of the different stakeholders involved in their long-term management.
- Policy does not acknowledge the benefits, or address the challenges of cross-borough working, that could particularly benefit high street-related projects.

The literature and the detailed analysis of London's high streets both revealed the complexity of high streets as a spatial type, the multiple endemic problems faced by high streets, particularly local ones, but also their continued value as physical, real estate, movement and exchange spaces. They further revealed the great opportunities, which high streets present for focused public and private investment and as an opportunity to use existing infrastructure and established communities as the basis for London's future growth, rather than seeking development opportunities in areas without the same in-built advantages. Moreover, investment in London's high streets would seem to accord with broad policy directions at national, London and local levels, which all stress (in aspirational ways) the value of such locations in economic, social and environmental terms.

High streets may be one of London's great unrealised opportunities. Therefore, rather than placing these complex entities in the 'too difficult to handle category', they could be made a strategic priority for public sector policy, investment and action over the next ten years, in the process benefitting both their existing communities of users, and the new ones yet to come.

Such an approach will need to begin with a different type of policy, one that is not just aspirational and analytical, but is visionary, and derives from a sense of what London's numerous and hugely varied high streets have to offer: what makes them special, what their unique selling points are, and what their place might be, not in a mythical retail hierarchy, but instead as vital, complex and immensely important assets of their local communities, with so much more to offer than just shopping.

It will also require a very different approach to their management both over the long-term, and day to day. It will require management that sees high streets not as a set of fragmented responsibilities, but instead in a holistic manner, where imperatives of exchange and movement are reconciled within the physical fabric in a manner that maintains a viable real estate market. London's high streets represent some of the most important spaces in the city, it is time they were treated as such.



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