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**Policy Implications of Recent Trends in
the High-Street/Retail Sector**

DECEMBER 2014

RESEARCH

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Abbreviations and Definitions

ATCM	Association of Town and City Management
BID	Business Improvement District
BIS	Department for Business, Innovation and Skills
LEP	Local Enterprise Partnership
LTRIP	Local Tax Re-investment Programmes
LPA	Local Planning Authority
NPPG	National Planning Policy Guidance
pp	percentage points
TIF	Tax Increment Finance
RTPI	Royal Town Planning Institute
Convenience goods	Retail goods generally bought regularly, locally and at low-cost, including: food and drink from specialist outlets or supermarkets; tobacco products and confectionery; shoe repairs and key cutting services. The definition used in this report is equivalent to that used by Experian in compiling the Goad database.
Comparison goods	Retail goods generally bought infrequently and for a higher price than convenience goods, including: books; home wares; electrical goods; clothing; jewellery; vehicles. The definition used in this report is equivalent to that used by Experian in compiling the Goad database.
Multiple	Retailer with more than one branch (aka 'chain' retailer)
Independent floorspace	Retail space occupied by an independent retailer, as opposed to a multiple

Executive Summary

URS and GL Hearn have been commissioned by the Department for Business, Innovation and Skills (BIS) to assess the policy implications of recent town centre and retail trends. There has been a lot of research in this area recently, but most of it has focused on the state of existing centres and current trends, and very little attention has been given to the appropriateness of current and emerging policy frameworks to respond to these trends at a spatial level.

Part one of this study uses data-analysis to identify town-centre typologies based on both indicators of performance, and indicators of a centre's innate, exogenous characteristics, such as its size and local economic context. As well as considering snapshot data, it analyses historical trends in vacancy, centre size, and the prevalence of multiples and charity shops, in order to understand how different types of centre have fared over the past decade.

In Part Two this typology of town centres is then applied to ten case study town centres: five within the Coast-to-Capital Local Enterprise Partnership (LEP) area and five within the Leeds City Region LEP area. By engaging directly with key stakeholders and policymakers, this part of the research sheds light on the effectiveness on the ground of current policy to address the most pervasive trends impacting on England's town centres. It highlights local policy makers' experiences and challenges in responding to and implementing national policy. Recommendations for each of the typologies identified in part one are presented for national, regional and local policy makers and interest groups.

Part 1: Data and Trend Analysis

A sample of 50 town centres in England was selected from the Experian Goad database. Data series were then combined to give four composite indicators: performance; local economic context; size; and diversity.

Analysis of these indicators for the sample of 50 centres revealed the following key results.

On performance¹ and local economic context:

- Centres are more likely to be successful if they are set within a strong local economy. The majority of sampled centres set in a strong economic context were found to be performing relatively well.

On performance and centre size:

- Larger centres tend to be able to overcome their immediate circumstances and thrive despite being set in a weak local economy, while smaller centres' fortunes tend to be tied closely to their local economic context.

On performance and centre diversity²:

- Centres performing well tend to be more homogeneous than under-performing centres (although it is important to note that correlation does not imply causation). Centres thriving despite a weak local economy tend to have a more diverse offer than thriving centres in a strong context (though this may be explained by the small sample size).
- The proportion of independently-owned retail space³ is similar for both under-performing and over-performing centres. A prevalence of independent stores does not look to be the reason for centres doing well in difficult circumstances. Thriving centres in a weak local economic context have less independent floorspace than other categories.

In-depth analysis of a sub-sample of 20 centres yielded the following observations:

On catchment size:

- Large centres tend to have large catchments, attracting visitors from a wide radius.
- Town centres that attract above-average spending on comparison goods⁴ tend to be more homogenous (that is, an above-average proportion of spending is on retail rather than cultural or leisure pursuits)⁵.

¹ Defined in terms of (1) the relative dominance and prevalence of charity shops; (2) the relative dominance and prevalence of vacant premises. A town centre with an above-average value for the performance indicator (relative to the English average) is described as over-performing, and vice versa. See Table 3.1 in the main document for a list of the sub-indicators used to create all indicators.

² Defined in terms of (1) the diversity of spending within the centre, and (2) the prevalence of independent retailers versus chain stores. For a fuller discussion of the results relating to diversity, see Section 4.4.

³ As opposed to space owned by chain store retailers.

⁴ For full definitions of comparison and convenience goods see the Abbreviations and Definitions table at the start of this report.

On trends in vacancy, size, diversity and charity shop prevalence over time:

- Virtually all of the sampled town centres – whether thriving or struggling – have recorded an increase in vacancy rates over the past decade.
- The 2008-9 recession and subsequent years of slow growth have had more of an impact on the centres in the sample that were already struggling.
- Charity shop floorspace has increased in around two-thirds of centres over the past decade. The data suggests medium-sized centres have been most susceptible to an increase in charity shops⁶.
- Contrary to the perceived trend of town centres becoming more ‘identikit’, independently-owned floorspace has risen as a proportion of all space over the past decade in 16 of the 20 sampled centres.
- The size of the centres examined has remained stable over the past decade, suggesting that overall, town centres have undergone little or modest physical change in response to broader trends.

In the light of the data analysis we have drawn up the following typology of town centres:

<p><i>Type 1 Centres</i></p> <p><i>Large, homogeneous, thriving</i></p>	<ul style="list-style-type: none"> • Offer dominated by comparison retail • Shoppers come from a wide radius • Relatively low, stable rates of vacancy • Increasing in size over time
<p><i>Type 2 Centres</i></p> <p><i>Medium-sized to large, diverse, struggling</i></p>	<ul style="list-style-type: none"> • Weak local economic context has a direct bearing on success • Relatively high vacancy rates are the norm • Losing out to larger ‘destination’ centres post-recession • Diverse, with above-average spending on non-retail activities
<p><i>Type 3 Centres</i></p>	<ul style="list-style-type: none"> • Relatively high vacancy is a long-term trend

⁵ This may be explained by the small sample size.

⁶ This may be explained by the small sample size.

<p><i>Small to medium-sized, weak local economic context, struggling</i></p>	<ul style="list-style-type: none"> • Convenience goods-driven; small comparison goods offer • Serve the local community and have a small catchment • The economic context in which they operate tends to be weak
<p><i>Type 4 Centres</i> <i>Small, strong local economic context, thriving</i></p>	<ul style="list-style-type: none"> • Tend to sit within strong economic contexts • Attract comparison goods shoppers from a wide radius • Are more reliant on local custom for convenience revenue • Attract a range of spending, including leisure and cultural • Responsive to trends – have reduced surplus retail floorspace

Part 2: Local Policy Responses to Retail Trends

This part of the research assesses how well high-street strategies in different areas are aligned with recent trends in the high street and the retail sector.

Recent Trends in Retail and High Street Use

The key recent trends and drivers of change are: technological advances, which have reduced demand for retail space; a large-scale switch to discount retailers post-recession; consumers increasingly seeking a shopping 'experience', which tends to favour larger, high-quality destinations; and the rising popularity of out-of-town retail for the purchase of larger items such as furniture.

These trends have generally had a negative impact on high street footfall, spending and vibrancy. An increased polarisation of centres has seen the strong get stronger and the weak get weaker, with risks of a vicious circle of declining spending, attractiveness, footfall and inward investment.

Case study areas

The ten centres selected for case study were:

- Leeds City Region: Leeds, Harrogate, Dewsbury, Wombwell, Hebden Bridge
- Coast to Capital: Croydon, Lewes, Horsham, Billingshurst, Newhaven.

Town centre policy is shaped at the local authority level, and therefore focuses on the centres' relationships within a local authority rather than with centres across the larger economic area. This inward looking policy focus is a barrier to aligning retail strategies and consultation has found that there can also be a lack of collaboration amongst town centre practitioners within a region. This may be because town centres are seen as being in competition with one another, meaning that the sharing of knowledge and best practice is rare.

Further, a review of the policy context has found that town centre policies tend to be defensive in seeking to protect traditional town centre activities, rather than promoting new activity. However, stakeholders reported that the National Planning Policy Framework (NPPF) was helpful in this respect, by encouraging plan makers to plan positively in shaping local development and allowing a flexible response tailored to each town's individual needs.

Recommendations

Type 1 Town Centres: Large, homogeneous, thriving

Large, successful centres have been able to capitalise on the trend for shopping as an 'experience', and many have significantly expanded their offer in recent years. This means they require a different policy response to centres struggling to fill their existing retail space.

Policy in relation to these centres should focus on maintaining their strong performance, and ensuring they continue to offer something unique and interesting to visitors. Because of larger centres' extended catchments, collaboration with other centres is particularly desirable to ensure that individual strategies for increasing footfall don't cut across one another.

<i>Top 5 Recommendations for Policy Makers and Practitioners</i>
<i>National</i>
<ul style="list-style-type: none">• Encourage collaboration amongst town centres in an economic region,

possibly working through the LEPs, to share knowledge and best practice

- Promote flexible planning to allow for adaptation to local conditions, for example by making conversion of retail space to residential easier where appropriate

*Local*⁷

- Capitalise on unique heritage and assets to promote a distinct sense of place. Exploit planning obligations (CIL/Section 106 agreements) from large-scale town centre redevelopment schemes to improve the public realm and infrastructure
- Promote an increase in office, leisure and cultural uses, including the evening and night time economy, to ensure footfall comes from a range of sources
- Ensure the city centre offer continually improves and adapts to meet new needs, both through physical improvement and by making use of innovative technologies

Type 2 Town Centres: Medium-large, diverse, struggling

Type 2 centres have a challenge attracting visitors, particularly when they face competition from a neighbouring regional centre or out-of-town retail outlet. Both of the Type 2 centres examined for this report – Dewsbury and Croydon – were found to be losing out to more attractive alternatives nearby.

Type 2 centres can combat this trend by giving people a reason to visit, partly through encouraging more diverse town centre uses so that towns become workplaces and meeting places as well as shopping centres, and partly by making the centre a desirable place to visit and spend time.

Top 5 Recommendations for Policy Makers and Practitioners

National

- Encourage partnership working amongst practitioners, to ensure policy decisions are beneficial to all town centres in an economic region. This

⁷ Local policy makers and practitioners include LEPs, local government, business improvement districts (BIDs), town teams, town councils, business groups, community groups and neighbourhood planning groups

is particularly important for 'secondary' towns facing competition from more successful neighbours

Local

- Promote an increase in leisure and cultural uses, including the evening and night time economy, to better compete with out-of-town centres
- Consolidate retail within the town centre and allow flexible change of use in non-core areas. Make appropriate and selective use of Compulsory Purchase Orders
- Where there is a surplus of office space, enable conversion to residential where appropriate, and improve the existing stock of office space to encourage localised footfall throughout the day
- Encourage temporary uses in vacant units, and events such as markets and festivals

Type 3 Town Centres: Small-medium, weak socio-economic context, struggling

The case study areas have shown that these areas often lose out to larger centres within the local authority area, both in terms of the attention and the investment they receive. Further, there can be a tension between wanting to retain a core of retail uses for the benefit of the local community, and wanting to create a more diverse mix of uses to encourage footfall. Policy documents can send out mixed messages in this regard.

The weak local economic context in which Type 3 centres sit presents an additional challenge for policy makers, as it will necessarily constrain the economic potential of the centre. A small centre needs to cater to local tastes in order to be successful, and convenience goods will therefore need to remain a significant component of the offer.

Top 5 Recommendations for Policy Makers and Practitioners

National

- Encourage partnership working amongst local practitioners, to ensure policy decisions are beneficial to all town centres in an economic region

Local

- Develop local policies to create a unique, distinctive shopping and leisure experience
- Promote the use of 'click and collect' points within the town centre to encourage footfall
- Encourage markets and other temporary attractions and encourage local food and craft producers to trade in town centres, e.g. through farmers' markets
- Promote neighbourhood planning to include high streets where appropriate. This could for example be done by encouraging retailers and town centre owners to be more involved in or even lead on neighbourhood planning.

Type 4 Town Centres: Small-medium, strong socio-economic context, thriving

The competitive advantage of many of the towns of this type lies in their unique heritage. Smaller town centres can create a niche shopping and leisure experience to complement larger neighbouring towns and out of town retail areas and this is a clear strength of Lewes, Horsham and Hebdon Bridge.

Top 5 Recommendations for Policy Makers and Practitioners

National

- Encourage partnership working amongst local practitioners, to ensure policy decisions are beneficial to all town centres in an economic region.

Local

- Nurture and protect the characteristics of the centre that have allowed it to thrive. Redevelopment activity should be sensitive to its context
- Keep abreast of changing consumer preferences through visitor surveys, to ensure that the centre continues to attract footfall and consumer spend
- Monitor the evolution of commercial property prices and rents, and act

to mitigate any potential negative impacts on small businesses through business rate relief if necessary

- Adopt new technologies as demand dictates, including through the use of libraries and post offices as digital hubs

1 Introduction

URS and GL Hearn have been commissioned by the Department for Business Innovation and Skills (BIS) to assess the policy implications of recent trends in the town centre/retail sector.

England's town centres are being impacted by a number of interacting trends, including:

- The product mix of high street stores is changing as, for example, books and music are increasingly replaced by digital and streaming content, and furniture and gardening products are sought in out-of-town retail parks offering a greater range and cheaper prices.
- 'Fixed price' and discount retailers, which have flourished in the economic downturn continue to thrive, as shoppers continue with recession shopping habits, and retailers capitalise on the number of vacant units available. However, it remains to be seen whether the benefits of increased footfall and reduced vacancy rates will outweigh the negative impact on image and perception that results from their presence.
- The use of WiFi in retailing is expected to grow. This is a challenge for the high street as it is something that is increasingly being employed by shopping centres as a way of advertising to consumers, and also collecting data on demographics and shopping patterns. Using WiFi to better connect retailers with consumers, as a collection of separate businesses on a high street, is more difficult.

In spite of the challenges town centres face, recent reports have indicated that UK town centres have returned to growth in 2013, recording the first growth since 2007, driven particularly by the food sector. It has also been reported that high streets are out-performing out-of-town and shopping centres in terms of vacancy levels, driven by discount stores and smaller format supermarkets.

This study uses data analysis to develop a typology of town centres, to identify the key points of commonality and difference across centres of different sizes, catchments, diversities and local economic contexts. The typology is then applied to ten case study town centres: five within the Coast-to-Capital Local Enterprise Partnership (LEP) area and five within the Leeds City Region LEP area, to investigate the implications of the centres' characteristics for the optimal policy approach.

The ultimate goal of the research is to understand how town centres are responding to broader trends in consumer behaviour and preferences, and to recommend policy responses to these trends tailored to each type of town centre.

The report is split into two parts:

- **Data and Trend Analysis** – The development of a typology of town centres through research and data analysis to examine and assess in a methodical, quantitative way relevant characteristics of a sample of town centres.
- **Local Strategy Development** – An assessment of how well local town or high street strategies within case study Local Enterprise Partnership (LEP) areas are aligned with the specific needs and characteristics of their town centres and high streets.

Throughout this document the term ‘town centres’ is used to cover all relevant sizes of centre, including local/neighbourhood centres and high streets.

2 Gaps in the Evidence Base and Role of This Report

2.1 Introduction

A large volume of research literature has been published in recent years suggesting quantitative approaches to measuring town centre performance, analysing the reasons for high street decline, and recommending policy adjustments to ensure that high streets retain their role as community hubs while adapting to broader social and economic change.

The most relevant recent publications are summarised in **Appendix A**. This chapter discusses the unique contribution that this study makes to the existing body of knowledge.

2.2 Analysis of Town Centres Using Data

Although several papers have defined a quantitative approach or framework for analysing town centre performance, the practical application of these recommended approaches is thin on the ground. This is likely to be a function of data availability; indicators such as the number of visitors to a centre, or the satisfaction of a centre's users, would need to be gathered via bespoke surveys, which is a time- and resource-intensive process.

The objective of the data analysis in this study is to understand how town centres with different characteristics have been impacted by recent trends in the high street and retail sector, building on the typology developed by the 2013 Gloucestershire LEP study⁸ in particular, which in turn drew heavily on the Key Performance Indicators (KPIs) developed by Genecon in 2011⁹. Evidence that the impacts have been different across different types of centre could imply a contrasting policy response for each town centre type.

This study therefore adds to the existing evidence base in the following ways:

- It considers both indicators of *performance*, and indicators of a centre's innate, exogenous *characteristics*, such as its size and local economic

⁸ gfirst and ATCM for BIS, *Successful town centres: developing effective strategies*, 2013

⁹ Genecon for BIS, *Understanding High Street Performance*, December 2011

context. Exogenous factors are beyond local policy practitioners' sphere of influence, and so need to be accounted for and stripped out in order to understand the implications of recent trends for policy.

- As well as considering snapshot data, it analyses *historical trends* in vacancy, centre size, and the prevalence of multiples and charity shops, in order to understand how different types of centre have fared over the past decade.
- It defines a typology of town centres that relies exclusively on *off-the-shelf data* rather than survey data collection, meaning the analysis can be replicated and extended.
- It then considers the *implications* of the typology for the optimal policy responses to town centre trends.

2.3 Analysis of Effectiveness of Policy via Case Study

Interest in the high street and retail sector has increased significantly in recent years with the publication of a number of high profile studies into the state of town centres. Studies such as the Portas¹⁰ and Grimsey¹¹ reviews have led discussion on the condition of high streets and town centres and suggested solutions to address current trends including the 'homogenisation of the high street'¹². A recent review by the British Retail Consortium¹³ recognised the role of both local and national government in creating the conditions for high streets to thrive and suggested greater use of the planning system to both facilitate development and encouraging investment through mechanisms such as Tax Increment Financing (TIF) and Local Tax Re-investment programmes (LTRIP). The Royal Town Planning Institute (RTPI) has also recently assessed the role of LEPs in the statutory planning system and concluded that, whilst they have an important role to play in promoting economic growth within their local area, LEPs are often on the periphery of the planning system¹⁴.

The majority of existing research has been focused on the state of existing centres and current trends, and very little attention has been given to the appropriateness of current and emerging policy frameworks to respond to these trends at a spatial level.

¹⁰ Mary Portas (2011); The Portas Review – An Independent Review into the Future of our High Streets.

¹¹ Grimsey (2013); An Alternative Future for the High Street.

¹² New Economics Foundation, (2010); Re-imagining the High Street: Escape from Clone Town Britain

¹³ British Retail Consortium, (2012); 21st Century High Streets: What Next for Britain's Town Centres?

¹⁴ RTPI, (2014); Planning for Growth: The role of Local Enterprise Partnerships in England.

The objective of the second part of this study is to interpret the effectiveness of policy at addressing recent trends within town centres in two LEP areas; the Coast to Capital LEP and the Leeds City Region LEP. As such, the study complements the existing body of quantitative analysis by reviewing the policy landscape at the national, regional and local levels, and focusing on each town centre's characteristics as set out in the typology produced in Part 1.

By engaging directly with key stakeholders and policymakers, the study sheds light on the effectiveness on the ground of current policy to address the most pervasive trends impacting on England's town centres. It highlights local policy makers' experiences and challenges in responding to and implementing national policy. It looks at town centre strategies across the study areas as a whole, and examines the interdependencies between approaches and the interactions between different places. Finally, it draws out examples of good practice and collaboration within study areas, as well as highlighting examples of a lack of collaboration or policy contradictions. Recommendations are presented for national, regional and local policy makers and interest groups.

The study is limited in that it focuses on the town centre policy of five discrete towns within two LEP areas therefore it is difficult to draw conclusions relating to the interconnectedness of policies across the LEP area as a whole.

3 Development of Town Centre Indicators

3.1 Introduction

In order to develop indicators of town centre performance and characteristics, a sample of 50 town centres was selected for analysis, ensuring a representative mix of sizes and locations.

A large volume of data was then appraised, in order to decide which series should be included in the analysis, taking into account the recommendations of previous research around the optimum indicators to use.

The selected data series were combined into quantitative indicators, providing a framework for the process of identifying commonalities and contrasts across the town centre sample.

The process for choosing the sample of 50 town centres, gathering and analysing the data and devising the indicators is set out in detail in **Appendix B**. The list of 50 town centres is given in **Appendix C** while the full list of data sets appraised for inclusion in the analysis is given in **Appendix D**.

3.2 Indicators

The four town centre indicators are listed in **Table 3.1**. Each indicator is the weighted sum of a small number of sub-indicators, which are also described briefly in the table.

The data analysis focuses on retail indicators, and for the most part does not look in detail at leisure, office, civic or other town centre uses (although spending on leisure, food and drink and cultural pursuits is examined). This choice is largely a function of data availability and quality.

The diversity and local economic context indicators draw on the 'diversity' and 'economic activity' indicators recommended in Genecon (2011), and on the 'diversity and vitality of place' and 'economic characteristics' indicator toolkits devised in GFirst (2013). However, they use a slightly different mix of sub-indicators, partly as a consequence of data availability, and partly to reflect the study's objective of separating out performance from innate characteristics.

Appendix E is a technical methodology for calculation of the indicators and sub-indicators.

Table 3.1 Indicators of Town Centre Characteristics

Indicator	Sub-indicators
Performance	Percentage of charity shop floorspace
	Average charity unit size relative to average shop size for centre ¹⁵
	Percentage of vacant shop floorspace
	Average vacant shop size relative to average shop size for centre
Local economic context	% of working age population employed in higher managerial, administrative and professional occupations ¹⁶
	% of working age population long-term unemployed
	% of population economically inactive through long-term sickness or disability
	Average gross disposable household income (GDHI) of local population
	% of spending on comparison goods
Size	Total floorspace
	Number of units
Diversity	Spending diversity index
	Independent floorspace ¹⁷ as a percentage of the total

¹⁵ Note that for three centres: Twickenham St Margarets; Goring-by-Sea and Haworth, no charity shop floorspace was recorded. This means that the relative size of charity shops variable was not applicable in these cases. It has therefore been removed from the calculation and the remaining three indicators have been weighted equally.

¹⁶ The source for this data is the National Statistics Socio-economic Classification (NS SeC), which is based on the Standard Occupations Classification 2010 (SOC 2010). Experian translate this series into local employment using drivetime data for the town centre.

¹⁷ Defined as retail space occupied by an independent retailer, as opposed to a chain store or 'multiple' retailer.

4 Characteristics of the Sample of 50 Town Centres

4.1 Introduction

As discussed in **Appendix B**, the 50 centres used for the first stage of the analysis are representative of the regional distribution of centres across England, and of the range of sizes of centre within each region. This section sets out the results of the analysis of these 50 centres, framed by the indicators described above. This analysis is then used to select a shortlist of 20 centres for more in-depth analysis.

It is important to note that the analysis is of only a relatively small sample of town centres across England; any generalisation to the wider population of centres should therefore be made with caution.

4.2 Town Centre Performance and Local Economic Context

Plotting the performance indicator against the local economic context indicator, as in Figure 4.1, gives four categories of town centre, represented by the four quadrants of the chart:

1. Centres that are thriving in a strong local economic context (top-right quadrant)
2. Centres that are thriving despite a weak local economic context (bottom-right)
3. Centres that are struggling despite a strong local economic context (top-left)
4. Centres that are struggling in a weak local economic context (bottom-left)

The 50 town centres chosen for the purposes of this analysis were on average slightly above-average by the performance indicator, relative to the English average. This translates to a slightly larger number of centres falling to the right of the y-axis: 28 centres fall in the right-hand half of the chart, against 22 on the left.

The 50 sample centres were also more economically-successful than the English average. This means that 37 of the 50 centres are plotted above the x-

axis in Figure 5.1 with only 13 having a negative value for the local economic context indicator.

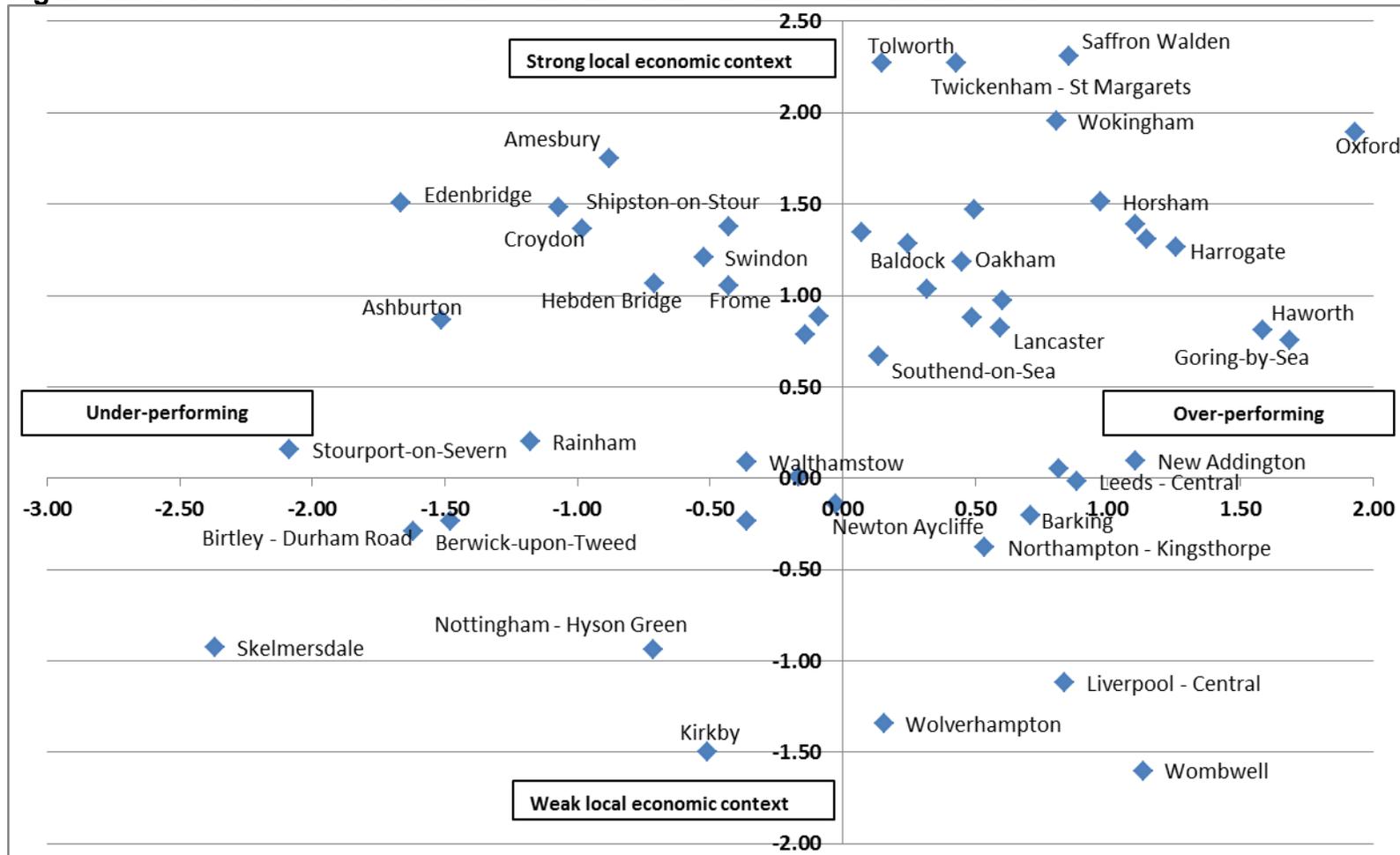
Plotting the two indicators together therefore leads to an uneven distribution of centres across the four quadrants. This is most pronounced in the case of the bottom-right quadrant, which contains centres with above-average performance in a poor economic context: only six town centres fall into this typology.

Performance and Context: key results

- Centres are more likely to be successful if they are set within a strong local economy: the majority of sampled centres set in a strong economic context (59%) were found to be over-performing.
- Within the sample, very few centres are thriving despite a weak local economy: only around a fifth of thriving centres are successful despite a weak context.
- Among under-performing centres, the under-performance is less severe when the centre is set within a strong local economy: performance is on average 24% higher for such centres, compared with struggling centres in a weak economic context.

The above results suggest that the strength of the local economy is an important determinant of a town centre's success, although it is possible for a centre to thrive in a weak economic context.

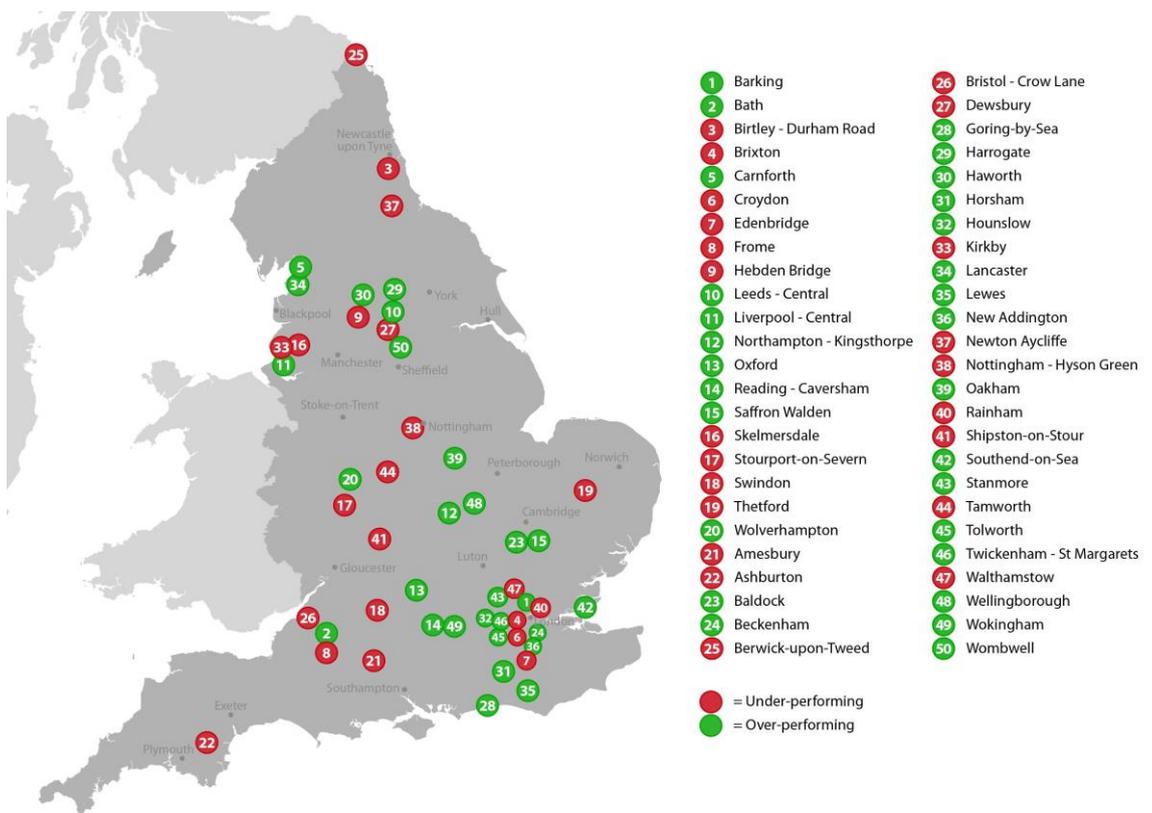
Figure 4.1 Scatter Plot of Performance and Local Economic Context Indicators



Plotting the performance of the 50 town centres on a map gives an indication of the extent to which performance varies geographically.

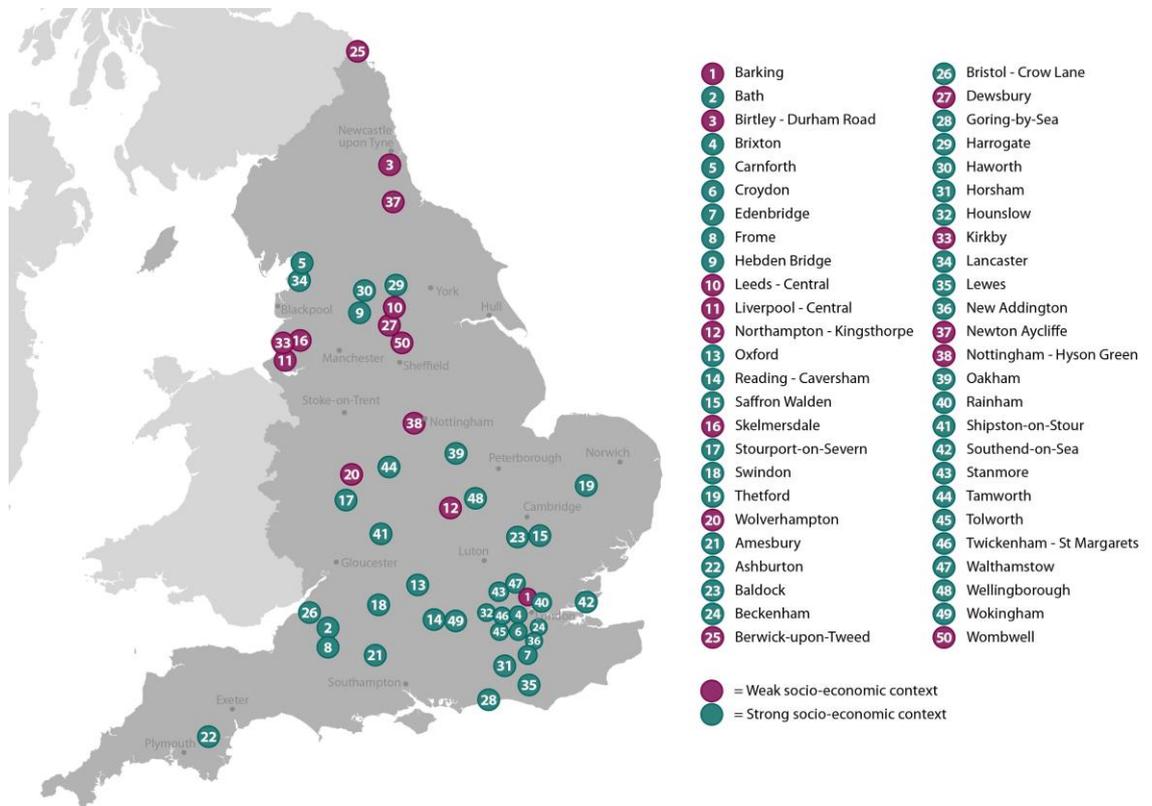
Figure 4.2 shows that the majority of centres across the Midlands and South East are over-performing by the performance indicator, while centres further west and north tend to be less successful overall.

Figure 4.2 Map of 50 Centres' Performance



As noted above, the majority of the sample is situated in a strong economic context. **Figure 4.3** shows the extent to which location and context are correlated: only one of the centres across the South East, Anglia and South West regions was found to have a weak local economy. The majority of weak local economic contexts examined are situated further north.

Figure 4.3 Map of 50 Centres' Local Economic Context



4.3

Town Centre Performance and Size

The centres in each quadrant were examined to see what similarities and differences they exhibited in terms of size, using the size indicator described in **Table 3.1**.

A second indicator of size was created using thresholds for urban and rural centres based on GL Hearn's professional judgement. The thresholds are given in **Table 4.1** below.

Table 4.1 Centre Size Thresholds

Centre Category	Size	Catchment drivetime (mins)	Floorspace (sqm): urban centre	Floorspace (sqm): rural centre
Small		10	< 50,000	< 30,000
Medium		20	50,000 to 150,000	30,000 to 100,000
Large		30	> 150,000	> 100,000

Source: GL Hearn

Figure 4.4 plots the performance of centres ordered by the size indicator. It shows that over- and under-performance occur across the size spectrum, although over-performance looks to be more prevalent among larger centres.

Figure 4.5 looks only at thriving centres, and shows the role of local economic context in centres of different sizes. The majority of over-performing centres have a strong economic context – this was established in Section 4.2 – but what organising the data by size shows is that medium-sized thriving centres tend to have the strongest local economies, suggesting that context plays a larger role in the fortunes of these town centres than is perhaps the case for large centres.

Figure 4.4 Performance of Town Centres Ordered by size

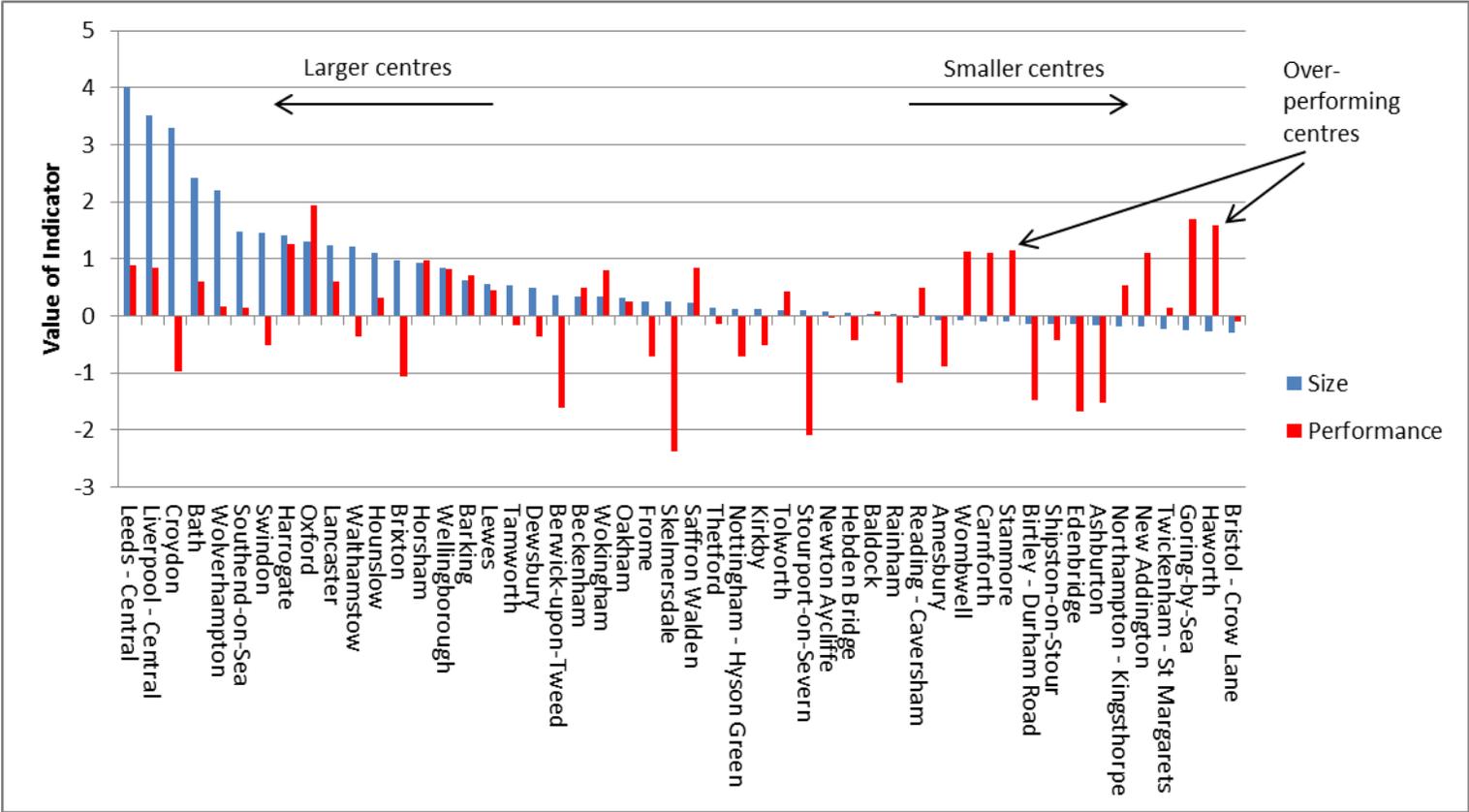
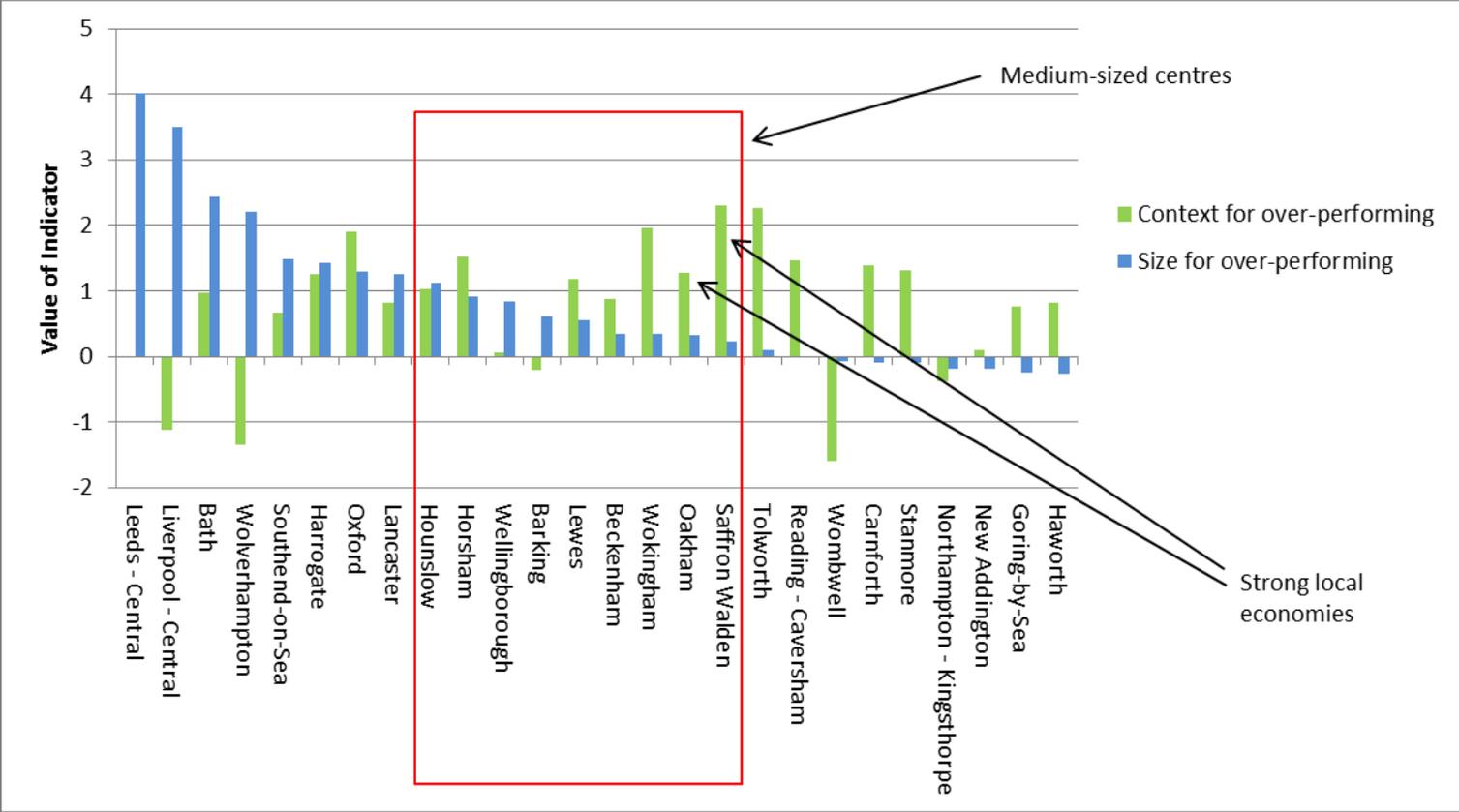


Figure 4.5 The strength of the local economy looks to be a key driver of success for medium-sized centres



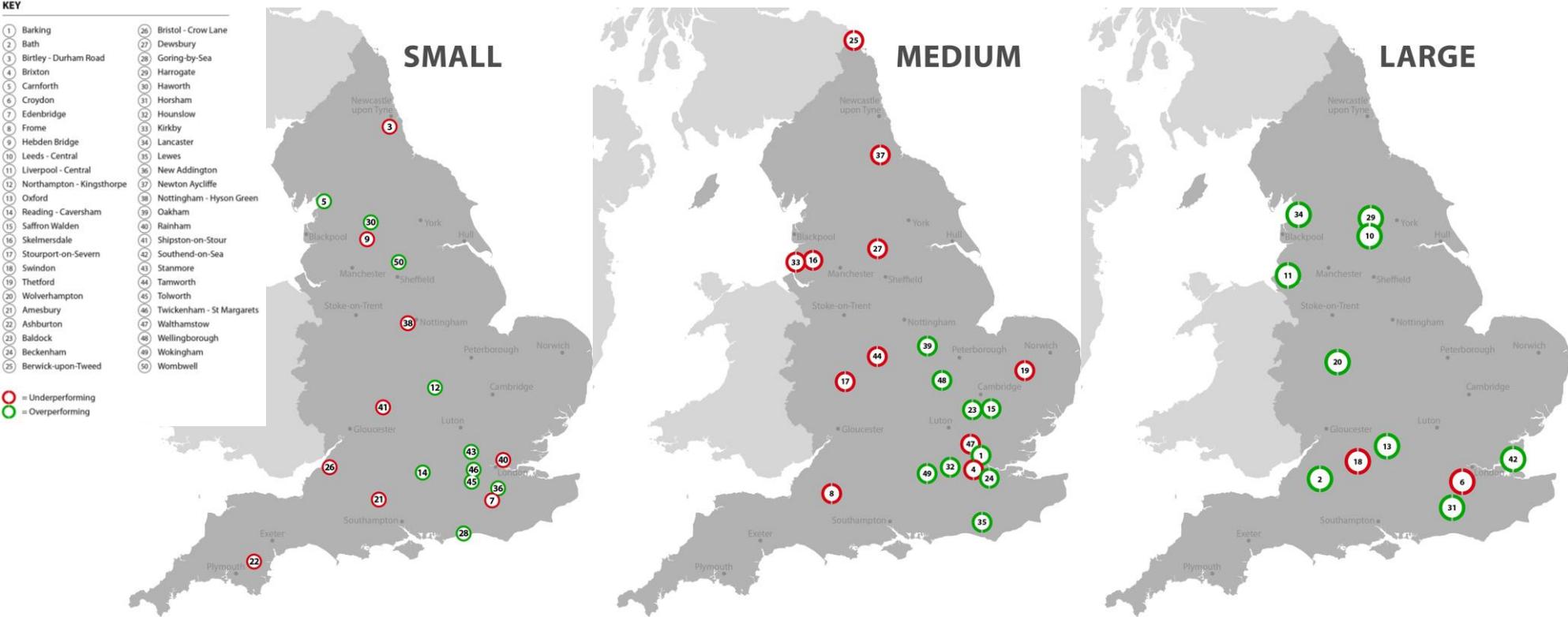
The analysis of the relationship between size, context and performance yields the following conclusions:

- Larger centres tend to be over-performing: more than 80% of the large centres in the sample are thriving according to the performance indicator.
- Among small and medium-sized centres, the mix between thriving and struggling centres is much more even: around half of both small and medium-sized centres are over-performing.
- However, small and medium-sized centres look to be much more dependent on their local economies: 89% of thriving medium-sized centres, and 80% of thriving small centres, are set within a strong local economic context (versus 67% of large thriving centres).
- Thriving centres have 374 units on average, compared with 268 units for struggling centres – equivalent to 67% more floorspace per centre.
- Thriving centres are more variable in size than struggling centres. A larger proportion of struggling centres (91%) are small or medium-sized, compared with thriving centres (68%).

Overall, the data suggests two key results: first, that there is a positive relationship between size and success, with larger centres tending to be more successful; and second, that larger centres are able to overcome their immediate circumstances and thrive despite being set in a weak local economy, while smaller centres' fortunes tend to be tied closely to their local economic context.

Figure 4.6 maps the 50 sampled town centres by size, to show spatially how performance varies across small, medium and large centres. Interestingly, it shows that the only poor-performing large centres in the sample are in the south of the country, while all of the sampled medium-sized centres in the west and north of the country are under-performing. The evidence of a relationship between geographical location and performance is less clear-cut looking at the sample of small centres.

Figure 4.6 Maps of Centre Performance by Size



4.4 Town Centre Performance and Diversity

Full details of the diversity indicator are given in Appendix B and Appendix E, but in summary the indicator measures the prevalence of independent stores versus ‘multiples’ or chain-store retailers, and the diversity of expenditure within the centre on retail, leisure and cultural pursuits.

Figure 4.7 plots the 50 centres in order of diversity, with the most homogeneous centres to the right of the chart, and the most diverse centres to the left. Figure 4.8 and Figure 4.9 show the diversity of particularly homogeneous subsets of the sample: those thriving in a strong context, and thriving centres of above-average size.

Analysis of the relationship between diversity, context and performance yields the following conclusions:

- Across the sample as a whole, over-performing centres tend to be more homogeneous than under-performing centres (see **Figure 4.7**: a positive value for the performance indicator is more prevalent to the right of the chart). What this means in practice is that an above-average proportion of a centre’s spending going on retail tends to go hand-in-hand with low vacancy and a smaller charity shop presence.
- This result becomes more nuanced when the local economic context is taken into account: centres that are thriving despite a weak local economy tend to have a more diverse offer than those thriving in a strong local economic context.
- Diversity is also a characteristic of under-performing centres in weak economic contexts: 6 of the 7 such centres had an above-average value for the diversity indicator. In such centres, retail spending is likely to be weighted towards lower-value goods, meaning it is a below-average proportion of overall spend.
- Thriving centres in a strong economic context tend to be more homogeneous: 17 of the 21 such centres had an offer that was less diverse than the English average (see **Figure 4.8**: 17 of the chart’s 21 red bars are negative)
- Looking at homogeneity and size together suggests that large and successful centres tend to be homogeneous (see **Figure 4.9**: 9 of the 16 red bars are negative). The smallest thriving centre in the sample –

Haworth – is also one of the most diverse centres, but in general, successful small centres are in line with the English average in terms of their diversity.

- The proportion of independent retail space is very similar for both under-performing and over-performing centres, at 65% and 60% respectively. A prevalence of independent stores does not look to be the reason for centres doing well in difficult circumstances: thriving centres in a weak local economic context have less independent floorspace than any other category.

The sample suggests the following key results: that a prevalence of independent retailers is neither a necessary nor a sufficient condition for success; that spending in larger centres is heavily weighted towards retail; and that spending in under-performing centres tends to be diverse, potentially reflecting the lower-value retail goods on offer.

It is important to note that the finding of a correlation between homogeneity and success does not imply that a lack of diversity *causes* success. It is more likely that a relatively high proportion of retail spending relative to spending of other types is a symptom of success.

Figure 4.7 Most of the high-performing centres are of below-average diversity

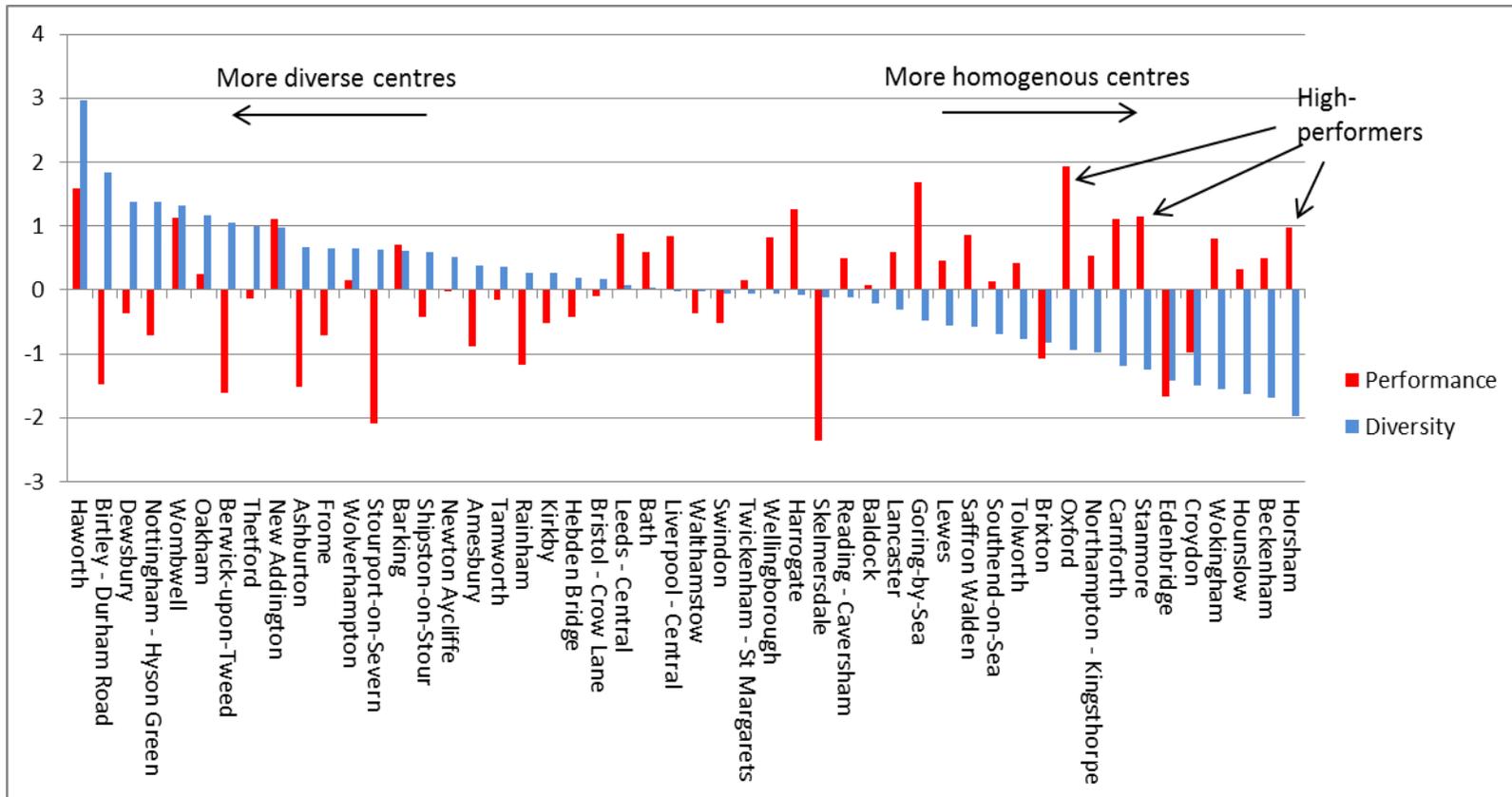


Figure 4.8 Thriving centres set in a strong context tend to be more homogenous

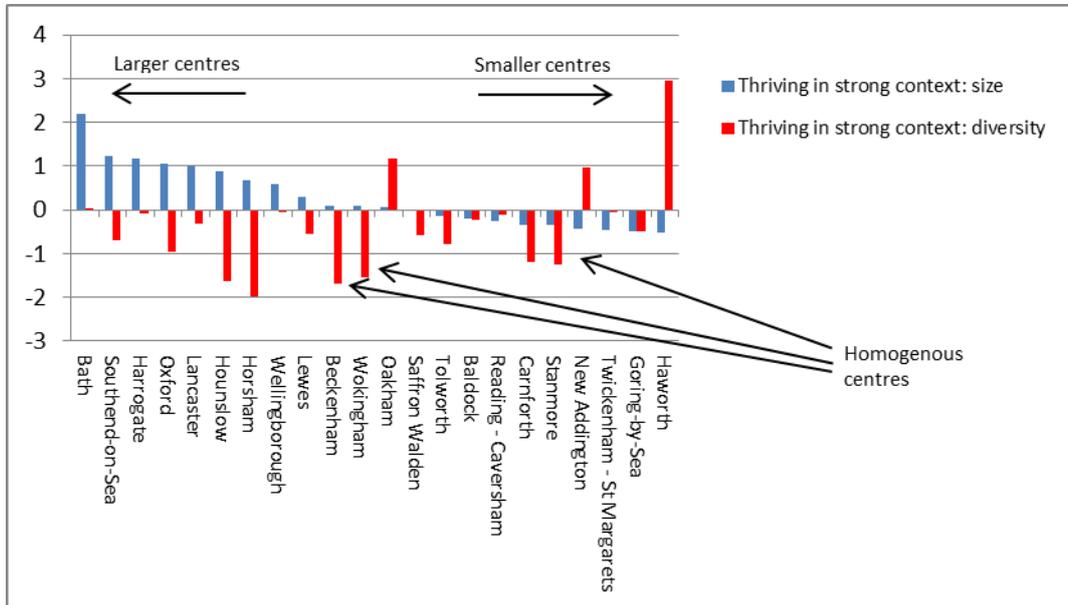


Figure 4.9 Large, successful centres tend to be more homogenous

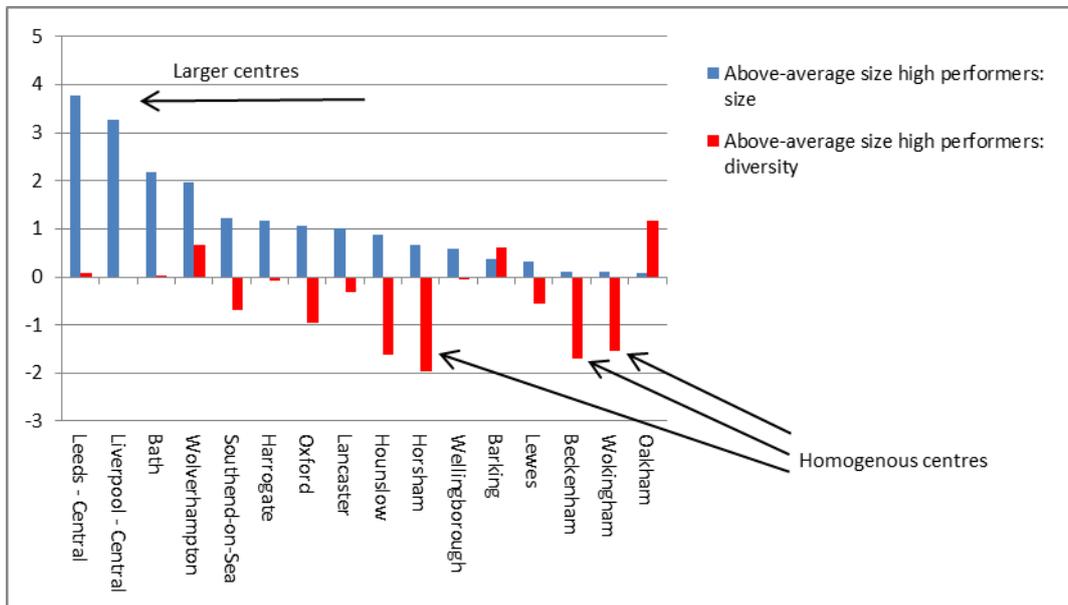
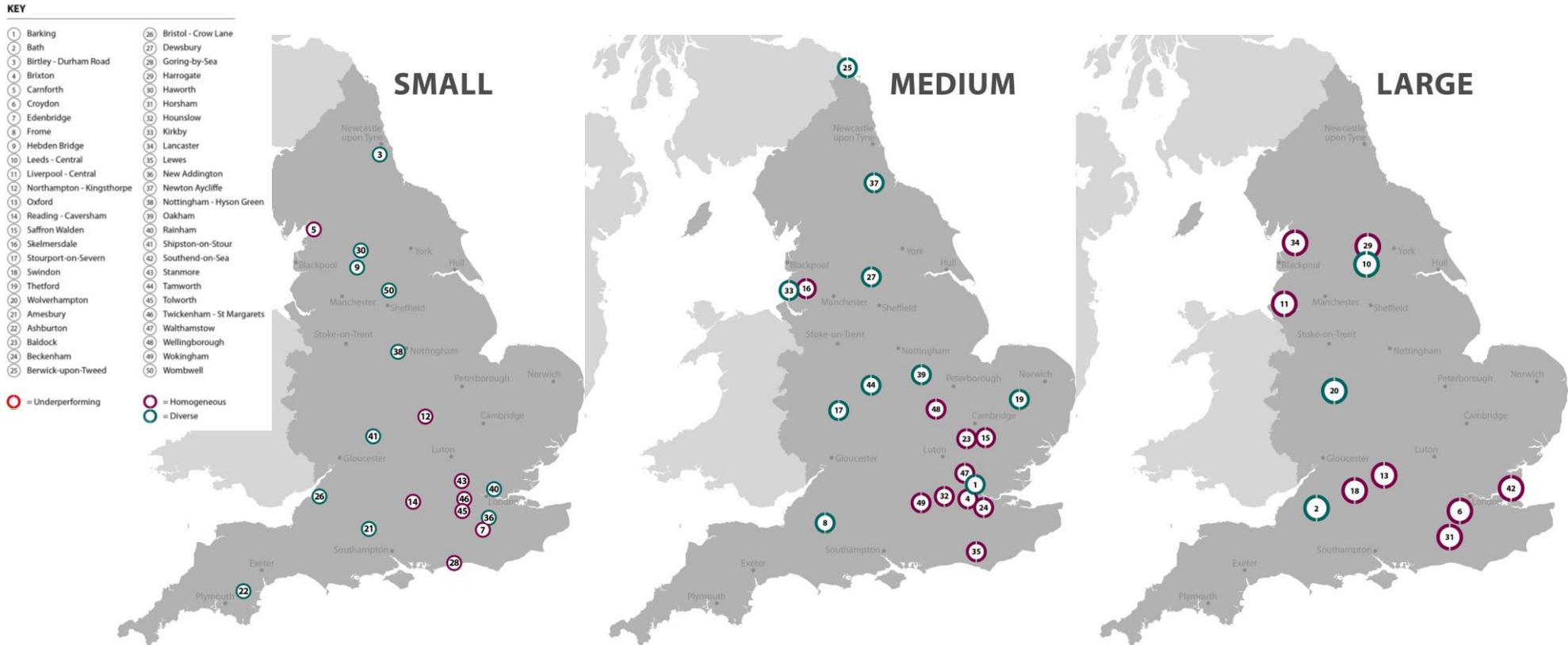


Figure 4.10 plots the geographical locations of the 50 centres, this time showing the diversity of small, medium and large centres. It shows that, across all sizes, sampled centres towards the south-east of the country tend to be homogenous, with a greater prevalence of diverse centres being found in the north and west of the country. It also reinforces the point that the majority of large centres in the sample are homogenous.

Figure 4.10 Maps of Centre Diversity by Size

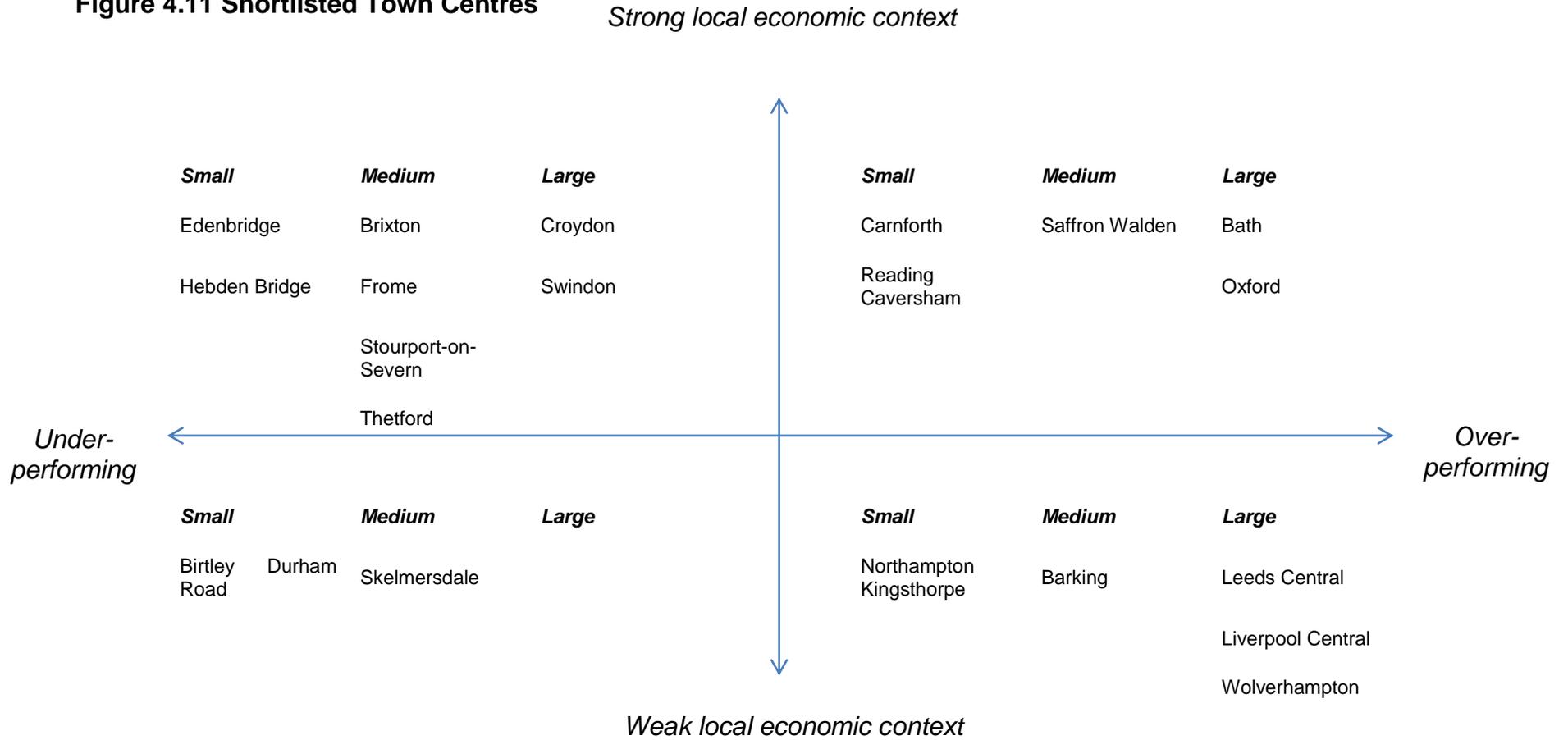


4.5 Shortlisting Process

The objective in selecting 20 centres for further analysis from the larger sample of 50 is to retain a mix of centre sizes, contexts, and levels of performance. A purely quantitative approach to shortlisting would be unlikely to deliver the mix of centres required to meet the study's objectives. For example, only six centres fall into the category of bring over-performing yet set within a challenging economic context, but a particular goal of this study is to understand the drivers of their success – meaning this category should be given disproportionate representation in the shortlist.

The shortlisted centres, together with the typology they fit into, are given in **Figure 4.11**.

Figure 4.11 Shortlisted Town Centres



5 Detailed Analysis of 20 Centres

5.1 Introduction

This section presents the results of in-depth analysis of the 20 shortlisted centres. Additional data series have been analysed that show the evolution of the centres over time, including trends in vacancy, size and the prevalence of multiples and charity shops. This allows for the identification of the characteristics that centres have in common, how they are changing over time, and how, for instance, they have been affected by the economic downturn, and takes the analysis one step further than the ‘snapshot’ presented in **Section 4**.

Another extension to the analysis outlined above is the inclusion of a detailed catchment assessment to get a more considered view of the ‘gravitational pull’ of each centre.

Below the catchment and trend data are described in more detail. The results of the analysis are then summarised.

5.2 Catchment Indicator

Two measures of catchment have been examined for the 20 shortlisted town centres¹⁸ – one for convenience goods, and another for comparison goods – in order to gauge each town centre’s trading performance in relation to its size. Catchment is both a driver and an indicator of performance; a large catchment will help to insulate a centre against local economic fluctuations, while catchment provides an indication of a centre’s success at attracting visitors beyond the immediate vicinity.

Convenience and comparison goods catchments are analysed separately to take account of the fact that centres tend to offer one or the other type of product, depending on their size and functionality. Smaller town centres typically function as sources of convenience goods, and attract limited comparison goods spending. Larger, higher-order centres perform primarily as non-food shopping destinations with significant and extensive comparison goods offers. Their convenience offer is therefore ancillary to this core function. In considering comparison and convenience goods separately, this distinction is retained.

¹⁸ Where the data is available

Data for the latest available year has been obtained where available; the fact that some centres' retail strategies have not been updated for several years places limitations on the comparisons that can be made and conclusions that can be drawn on the basis of the data.

An indicator of trading density is used to gain an insight into the 20 centres' catchment sizes. Trading density is derived from the market share-based turnover, which is defined below.

Market Share-Based Turnover

The market share-based turnover of a centre is an estimate of total spending per annum at that centre. It is obtained by applying an estimate of the propensity to shop at the centre to an estimate of total retail spending within the centre. The propensity data is collected via a household telephone survey, covering residents in the vicinity of the centre. This data is then adjusted to take account of the inflow of shoppers from outside the local area, through on-the-street surveys, consultation with town centre managers, tourism studies, and consultation with organisations such as the local chambers of commerce.

Turnovers are calculated separately for comparison and convenience goods.

Trading density

The trading density of a centre is the estimated market share-based turnover per square metre of floorspace within the centre.

The trading densities for comparison goods and convenience goods have been calculated separately for each centre. A centre's comparison goods trading density is defined as the market share-based turnover for comparison goods per square metre of floorspace devoted to comparison goods sales. The definition for convenience goods is analogous.

In order to produce a standardised indicator of catchment size, each centre's density is expressed relative to the English mean. The methodology for deriving the catchment indicator is outlined in **Appendix E**.

5.3 Catchment Analysis

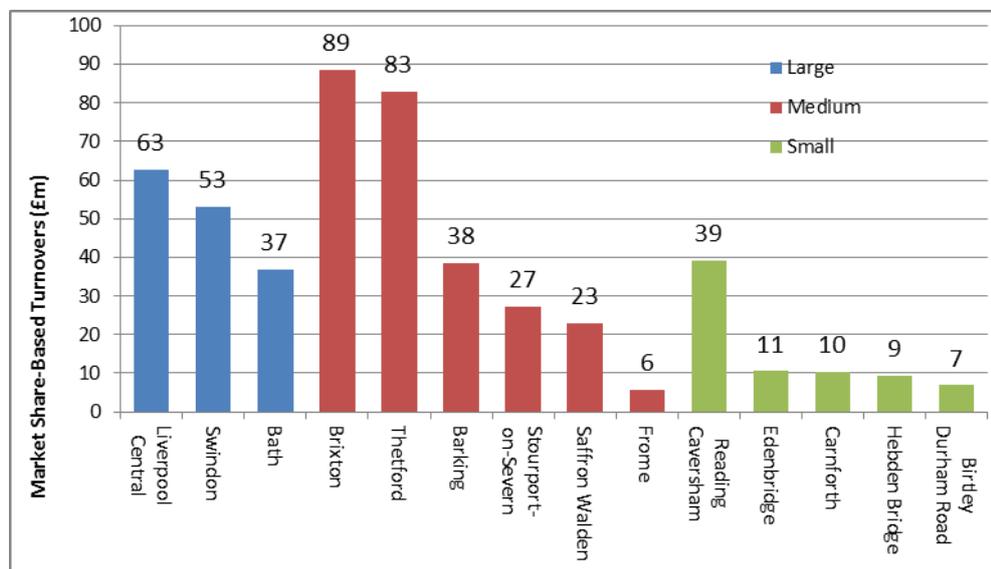
First, comparison and convenience goods are considered separately, looking at market share-based turnover. Turnover is then converted to trading density, and then to a standardised indicator of catchment.

Catchment and Size

Figure 5.1 and **Figure 5.2** below show the distributions of market share-based turnover and trading density of floorspace for convenience goods, grouped by size, for the 14 centres for which data was available.

Figure 5.1 shows that larger centres do not necessarily generate greater market share-based turnovers. The two centres in the sample with the largest turnovers, Brixton and Thetford, are only of medium size. Further, Reading Caversham, a small centre, generates a larger market share-based turnover than Bath, a large centre. In general, however, larger centres do tend to generate larger turnovers, as might be expected.

Figure 5.1 Market Share-Based Turnover: Convenience Goods



In contrast, **Figure 5.2** shows that there is no discernible relationship between trading density and size. Birtley Durham Road, for example, has the second-lowest market share-based turnover of the sample. However, due to its low quantum of floorspace, this centre has one of the highest trading densities. Reading Caversham is classed as a small centre, but boasts the highest convenience goods trading density of the sample: half of the centre's floorspace is devoted to convenience shopping, with Waitrose, Iceland and Tesco all occupying retail space.

Figure 5.2 Trading Density of Floorspace: Convenience Goods

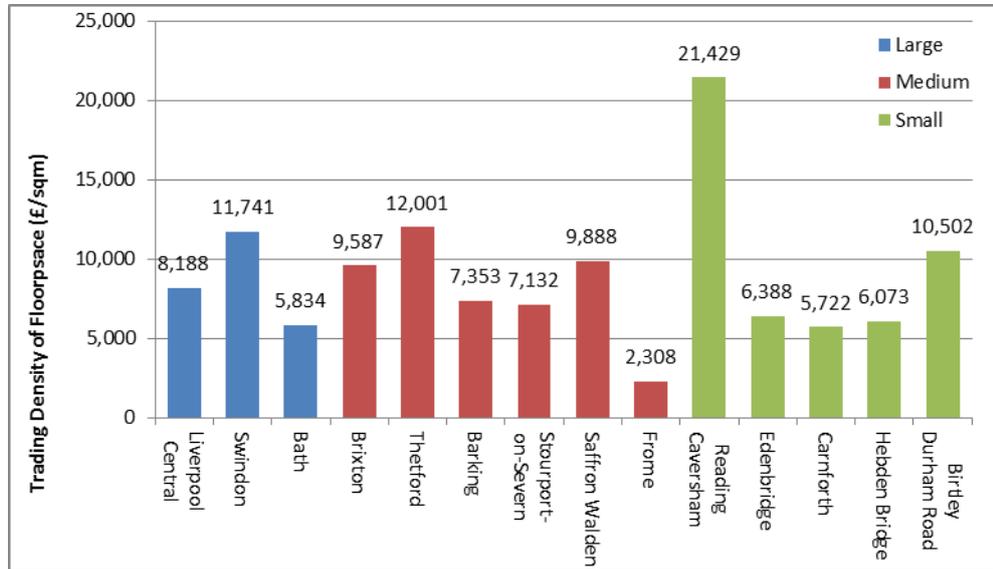


Figure 5.3 and Figure 5.5 show the distribution of market share-based turnovers and trading densities of floorspace for comparison goods. It is provided for the 13 centres for which information is available.

Figure 5.3 Market Share-Based Turnover: Comparison Goods

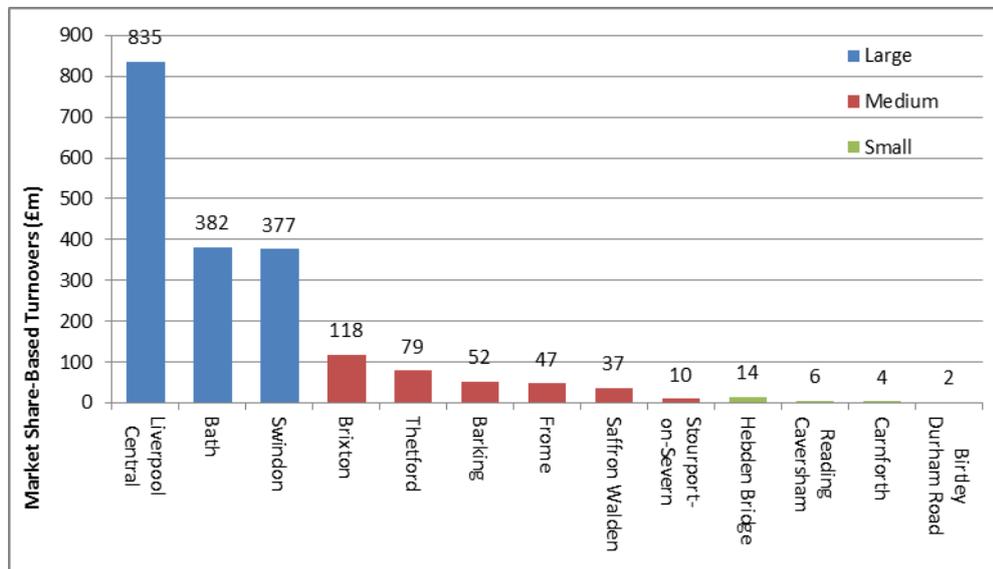
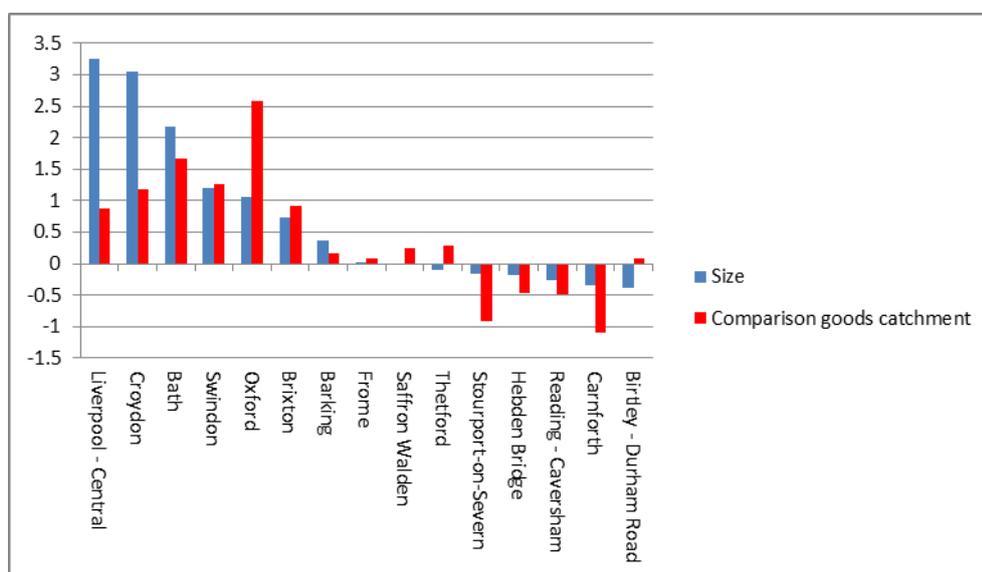


Figure 5.3 suggests a much stronger relationship between centre size and turnover for comparison goods than is the case for convenience goods, with no exceptions to the rule that larger centres have higher comparison goods

turnover. The magnitude and variability of comparison goods turnover relative to that for convenience goods is also significant: Liverpool Central, for example, generates over £800m turnover for comparison goods, compared to just £63m for convenience goods: evidence that spending on comparison goods tends to dominate retail activity in larger centres, with convenience spending being ancillary to their core function. It also suggests that the size of large centres is determined by the size of their comparison rather than convenience offer.

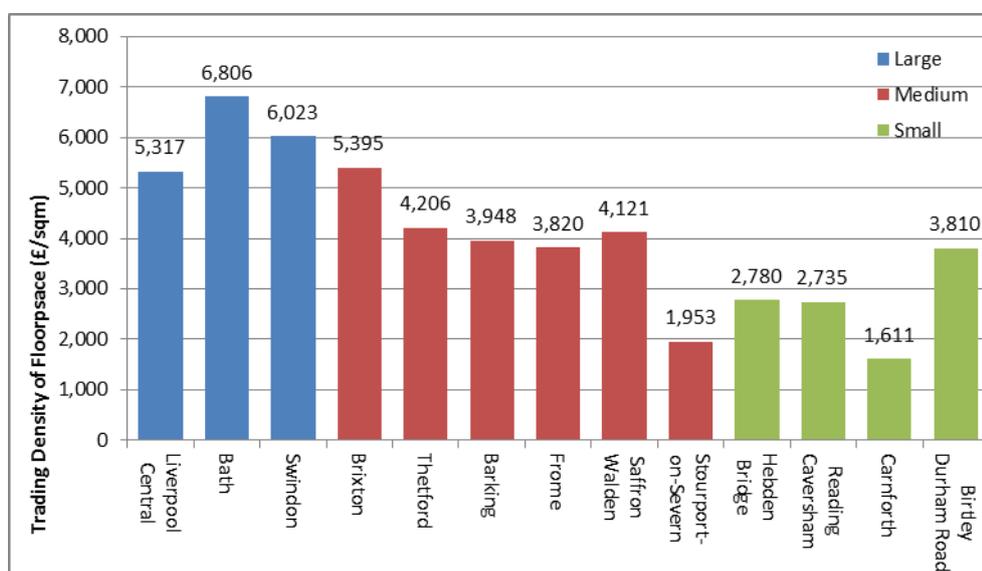
Figure 5.4 plots the size indicator next to the convenience goods catchment indicator, and shows again how larger centres tend to have above-average catchments for convenience goods.

Figure 5.4 Larger centres tend to have large catchments for comparison goods retail



Despite the strong relationship between comparison goods turnover and size, converting turnover to density shows a similar pattern to that for convenience goods, as shown in Figure 5.5.

As was the case for convenience goods, centres of all sizes have a mix of trading densities, although in general larger centres do tend to have higher trading densities. Comparing trading densities for comparison goods is a useful way of accounting for variations in size and understanding whether a centre ‘punches above its weight’. For larger centres such as Liverpool, trading densities are likely to be brought down by the larger unit sizes associated with landmark retail destinations.

Figure 5.5 Trading Density of Floorspace: Comparison Goods

Catchment and Local Economic Context

Key finding

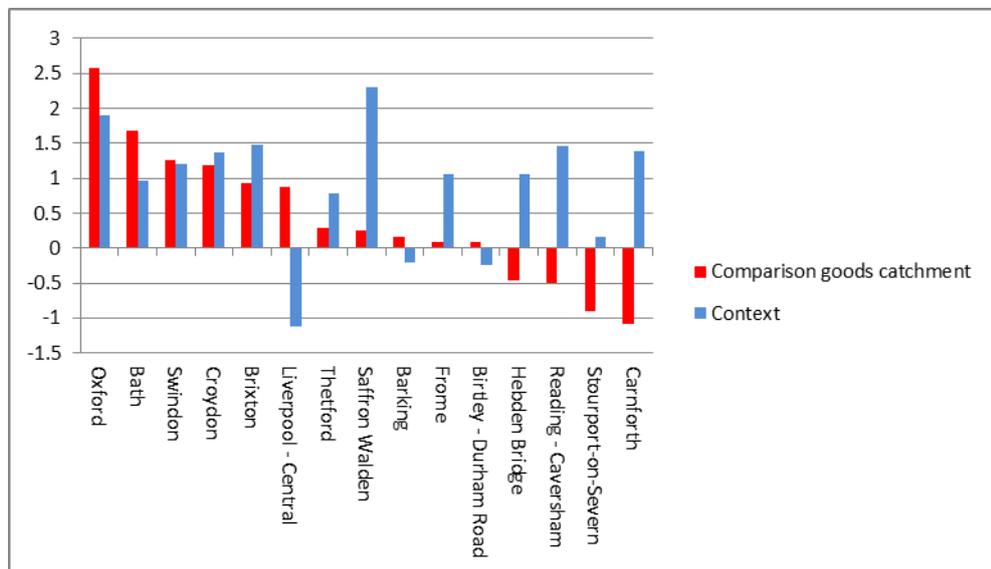
Centres with a large catchment for comparison goods (i.e. that attract visitors for comparison goods shopping from a wide radius) tend to be larger than average, and to operate in a stronger local economic context, than centres with a small catchment for comparison goods.

Figure 5.6 plots the local economic context indicator against the comparison goods catchment indicator, as defined in **Section 5.2**. The data suggests that, for medium and large centres, a large comparison goods catchment is associated with a strong local economic context. The four town centres with strong economic contexts in the large size category – Bath, Oxford, Croydon and Swindon – all score well by the catchment indicator, while the four medium-sized town centres within a strong context, Brixton, Frome, Saffron Walden and Thetford, also all have an above-average catchment size, although to a lesser degree.

In contrast, the three small centres within a strong local economic context, Carnforth, Reading Caversham and Hebden Bridge, all have below-average catchment sizes for comparison goods, suggesting they serve a predominantly local market (although in Reading Caversham's case, it will be losing comparison shoppers to nearby Reading town centre). Two of these centres are thriving by the performance indicator.

This is consistent with the earlier finding that local economic context matters more for the success of small centres (Section 4.3): if local trade provides the core of a centre’s business, the health of the local economy will have a direct bearing on the success of the centre. This has implications for local policy makers, particularly those concerned with reinvigorating small, under-performing centres. With local economic conditions dominating any other influence over a centre’s fortunes, town centre management on its own is unlikely to deliver the desired improvement to a centre’s performance. In these circumstances, therefore, town centre policy needs to be closely coordinated with wider economic development policy, to avoid potentially ineffective interventions.

Figure 5.6 Large comparison goods catchment associated with a strong local economy



It is less clear that the opposite is true, and that centres in a weak local economic context tend to have a smaller catchment: all of the town centres operating in a weak economic context have an above-average catchment (although most are not far above the average). Of the centres within a weak context, Liverpool, a large centre, has by far the largest catchment. This is further evidence that size may be a more important factor than economic context in determining catchment size for comparison goods, and the performance of the centre more generally. This makes intuitive sense, since large centres can ‘overcome’ their context if they attract visitors from a wide radius.

Comparing comparison goods catchment size with the centre size indicator provides further evidence of the relationship between size and catchment. Of

the eleven town centres with an above-average catchment size, ten are either medium or large, with Birtley – Durham Road the only small town centre with a large catchment.

Key findings

Town centres that attract above-average spending on comparison goods tend to be homogeneous (that is, the majority of spending is on retail rather than cultural or leisure pursuits)

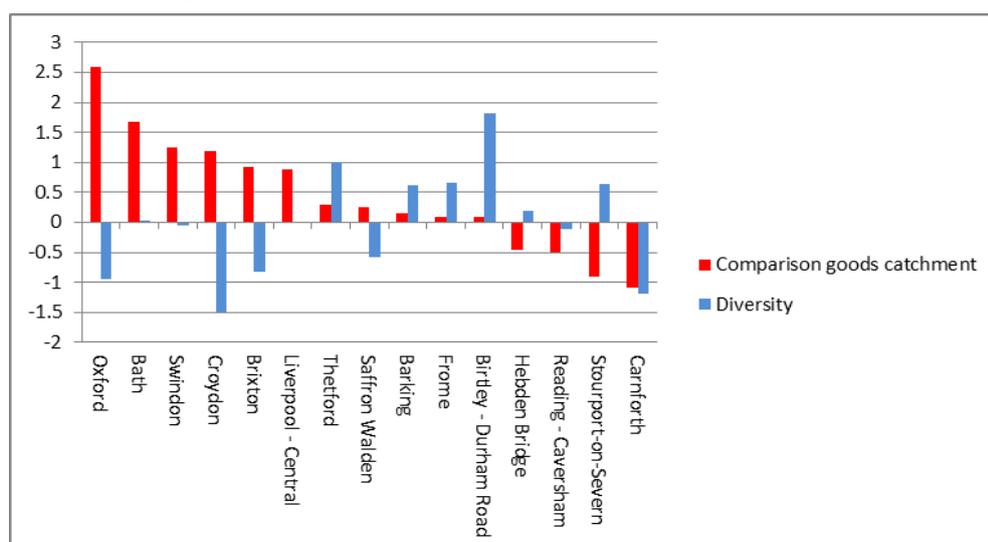
Conversely, town centres that attract above-average spending on convenience goods tend to attract other types of spending besides retail, including on cafes, restaurants, and cultural activities

Catchment and Diversity

Eight of the sampled town centres are deemed to be homogeneous by the diversity indicator.

Figure 5.7 shows that, of these eight centres, six achieved an above-expected comparison goods trading density. Further, five of the six centres with the largest catchment for comparison goods are homogeneous. Together these results indicate that centres with a large catchment tend to be homogeneous in nature, with retail spending in all likelihood dwarfing all other forms of expenditure. The data also suggests that homogeneous centres with a large catchment tend to be larger in size. Of the eight such centres, four are categorised as large, two are medium-sized, and two are small.

Figure 5.7 Centres with large catchments tend to be homogenous



The evidence tentatively suggests that the opposite is true for convenience goods catchments: four of the seven diverse centres in the sample have an above-average convenience goods catchment. However the sample size is small.

5.4 **Analysis of Trends over Time**

Town centres are not static: shopping patterns change over time as consumers' needs and preferences shift; redevelopment and regeneration can act as catalysts for change; and centres can impact upon one another, causing a displacement of consumer spending as one centre increases in size and displaces spending from its neighbours. Assessing trends in town centre performance therefore provides a more nuanced assessment of town centre performance.

The following historical data has been analysed to understand trends over time:

- Vacancy rate
- Charity shop floorspace
- The number of units
- Floorspace

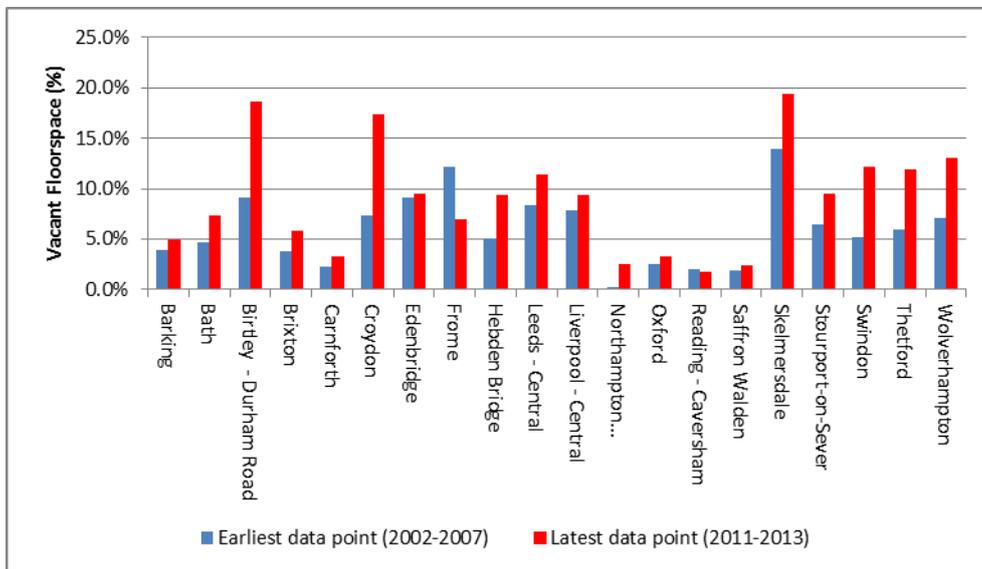
As discussed in Appendix E, a snapshot of vacancy rates can be misleading: development activity in an otherwise successful centre, such as developments recently undertaken in Leeds and Sheffield, will temporarily boost vacancy rates. Looking over a longer time period teases out these anomalies, exposing those centres that have reported persistent high vacancy rates over a period of several years.

Assessing trends in vacancy, floorspace and units will also enable an assessment of which types of town centre have proved most resilient to the economic downturn.

5.5 **Trends in Vacant Floorspace**

Figure 5.8 compares the earliest available data on vacancy rates (generally gathered via survey in 2003 and 2004, although a few centres have data only from 2007) with the most recent data (generally gathered in 2012 and 2013). As well as showing which centres have seen the largest increase in vacancy rates over the period, it highlights the variation in vacancy rates across centres, with some centres most recently reporting vacancy as high as 19% (in the case of Skelmersdale).

Figure 5.8 Vacant Floorspace (% of total)



Key finding

Virtually all of the sampled town centres – whether thriving or struggling – have recorded an increase in vacancy rates over the past decade

Splitting the data into thriving and struggling centres, it can be seen that although vacancy rates have risen across both groups, the rise in thriving centres has generally been modest: on average, thriving centres have experienced a 1.5 percentage-point rise in vacant floorspace between the earliest and most recent survey dates, while vacancy in struggling centres has risen by 5 percentage points on average.

Figure 5.9 and **Figure 5.10** plot the evolution of vacancy rates over time (missing years are interpolated for the purposes of charting the data; data points are shown with a marker). The two charts show that vacancy rates have exhibited similar behaviour across thriving centres, while vacancy rates in struggling centres have tended to be both higher and more volatile.

Figure 5.9 Trends in Vacancy Rates: Thriving Centres

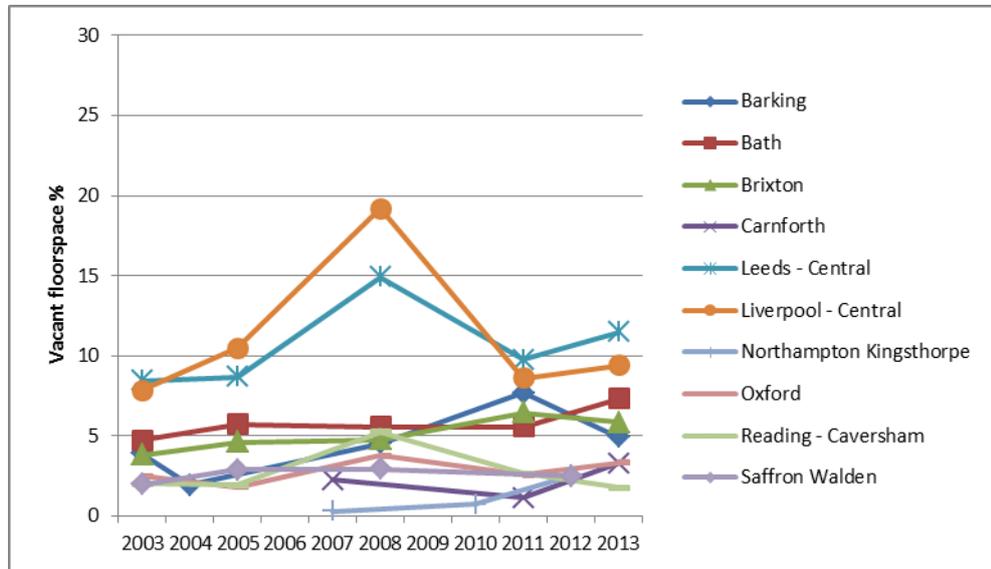
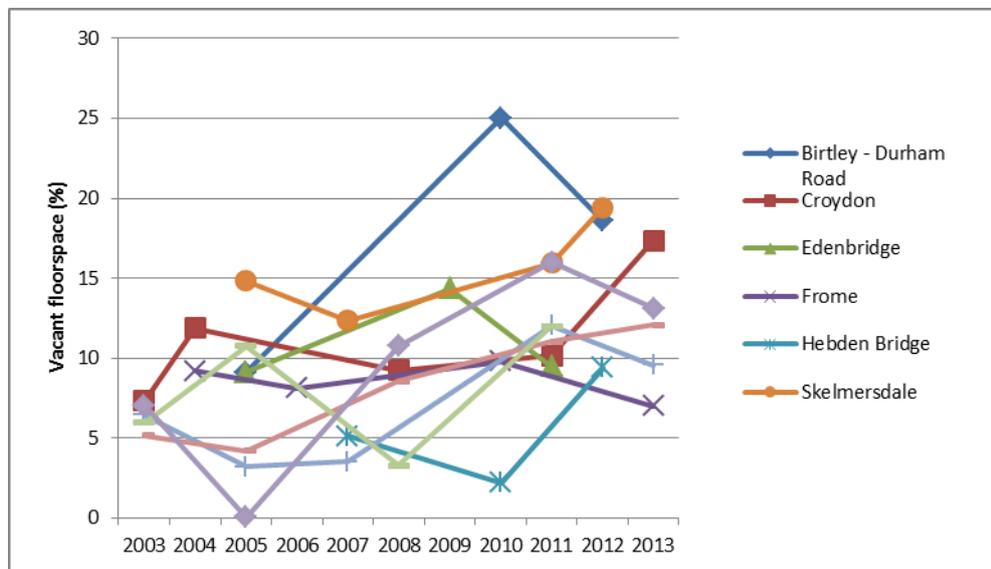


Figure 5.10 Trends in Vacancy Rates: Struggling Centres



The time series charts expose the temporary surges in vacancy rates due to regeneration initiatives, discussed earlier. The significant uptick in vacancy in Liverpool and Leeds in 2008, for example, can be attributed to significant redevelopment projects: at that time the Paradise Street/Project Jennifer (now

Liverpool One) retail centre was being developed in Liverpool, while the Trinity Centre was being constructed in Leeds.

Croydon's current 17% vacancy rate is also exposed as being a recent and in all likelihood temporary phenomenon, resulting from regeneration activity in the town centre, although vacancy rates had been relatively high in the years prior to redevelopment (and are in fact likely to be a driver of the regeneration activity). The classification of Croydon as an under-performing centre is therefore maintained, though the scale of planned investment has the potential to change the centre's fortunes significantly.

Key finding

The recession looks to have had more of an impact on centres that were already struggling. Vacancy rates have risen more since 2008 in those centres.

The recession in the UK began in late-2008, and peaked in 2009, with growth being sluggish in the years following. Due to data limitations, it is difficult to draw firm conclusions about the impact of the recession on vacancy rates, but there is little evidence of a recession impact on vacancy rates in the data for thriving centres presented in **Figure 5.9**, with vacancy rates falling in 6 of the 10 centres in the period immediately following the onset of recession in 2008. Vacancy rates do look to have increased to a greater extent across struggling centres, with 7 of the 10 centres' vacancy rates rising in the wake of the recession; however, the volatility of the data means it is impossible to isolate the recession effect from the background noise in the data.

The time series data allows us to review the original grouping of centres into 'thriving' and 'struggling' categories, and to see whether some centres' performance may have been misinterpreted on the basis of a misleading present-day snapshot of vacancy rates. For the majority of centres, current vacancy rates look to be a good proxy for the success of the centre; where vacancy is low, it has tended to be low and stable over the recent past, while the majority of struggling centres have had high and/or rising vacancy rates for several years.

5.6 Trends in Charity Shop Floorspace

The quantum of charity shop floorspace has risen in 13 of the 20 centres, with a very similar proportion of over-performing and under-performing centres experiencing an increase over the survey period. Taking size into account, the data suggests medium-sized centres have experienced the most widespread increase in charity shop space: 6 of the 7 medium-sized centres have seen an increase in charity shop floorspace, compared with 2 of 6 small centres, although the historical data can be volatile (Figure 5.11 and Figure 5.12).

Figure 5.11 Trends in Charity Shop Floorspace: Medium-sized Centres

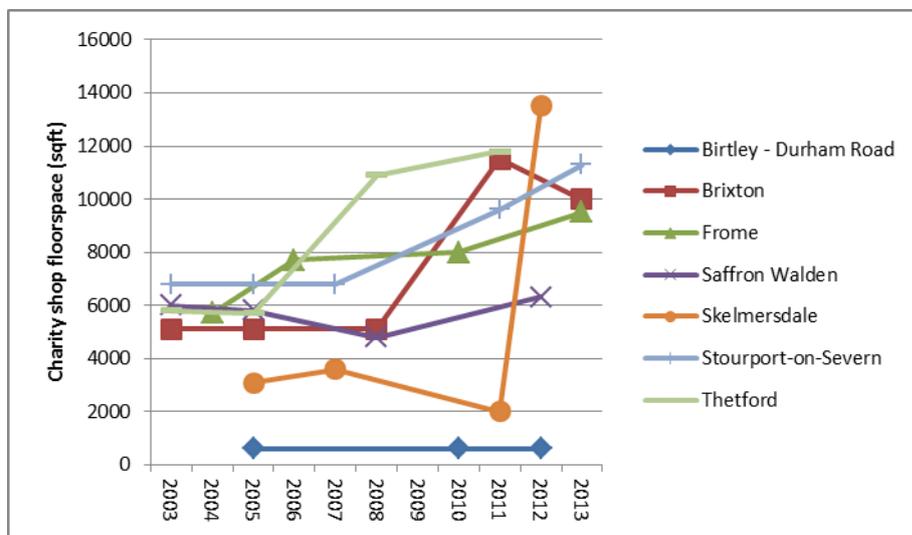
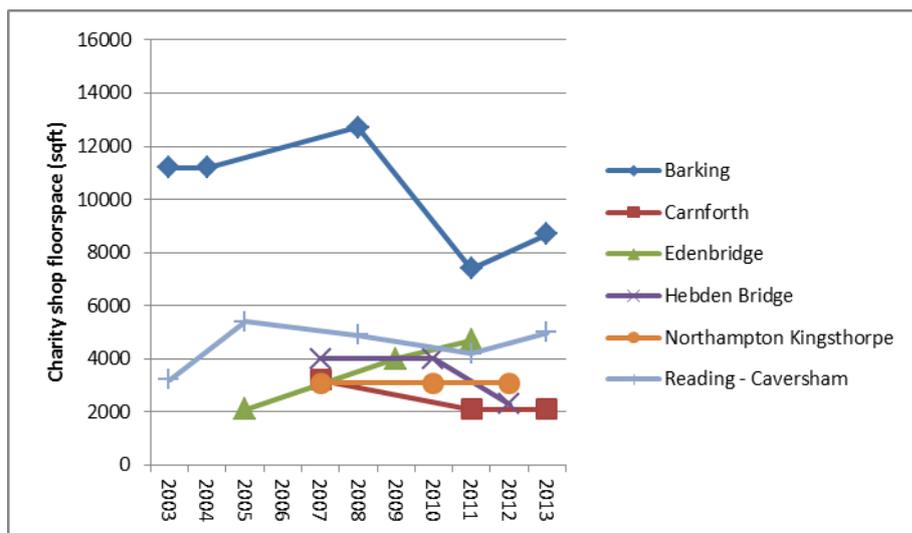


Figure 5.12 Trends in Charity Shop Floorspace: Small Centres



5.7 Trends in Independent Floorspace

Only four of the 20 centres in the sample have seen independent retail space shrink as a proportion of total floorspace over the past decade: for the majority of centres, independent floorspace has risen both in absolute terms, and as a proportion of the total – a result that runs counter to the perception that town centres are increasingly dominated by chain stores.

For a small number of centres, changes to the proportion of independent retail space do not tell the whole story. For example, Reading Caversham has lost independent floorspace, but because a larger quantum of multiple floorspace has been lost, the proportion of floorspace devoted to independent retailers has risen. Bath has gained independent retail space, but because multiple retailer space has risen by more, the proportion of independent retail space has fallen.

The data suggests that the proportion of independent space in over-performing centres has changed only marginally (**Figure 5.13**), while under-performing centres have experienced more volatility in the balance of independent versus multiple floorspace (**Figure 5.14**), and have on average a higher proportion of independent space (63% versus 56% for thriving centres). Overall, very few centres have seen a 'seismic shift' in the mix of independent and multiple retailers.

Figure 5.13 Trends in Independent Floorspace: Thriving Centres

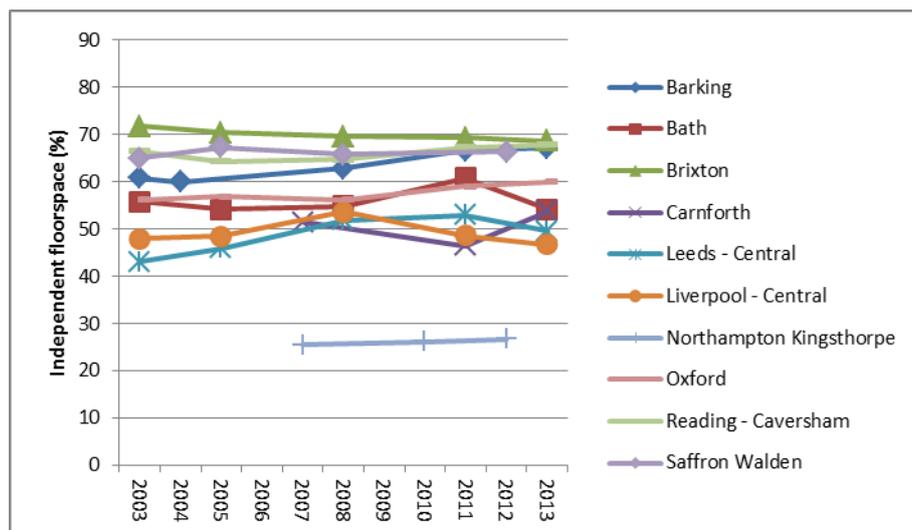
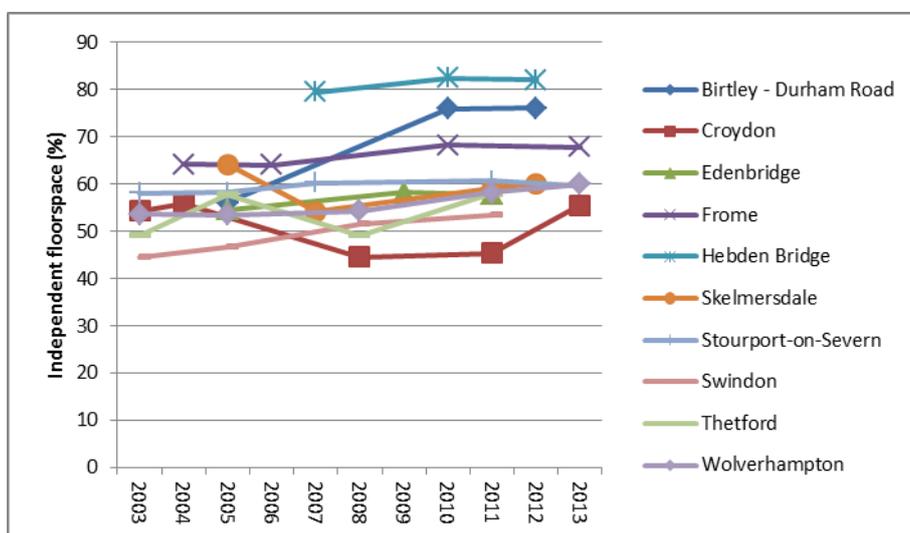


Figure 5.14 Trends in Independent Floorspace: Struggling Centres

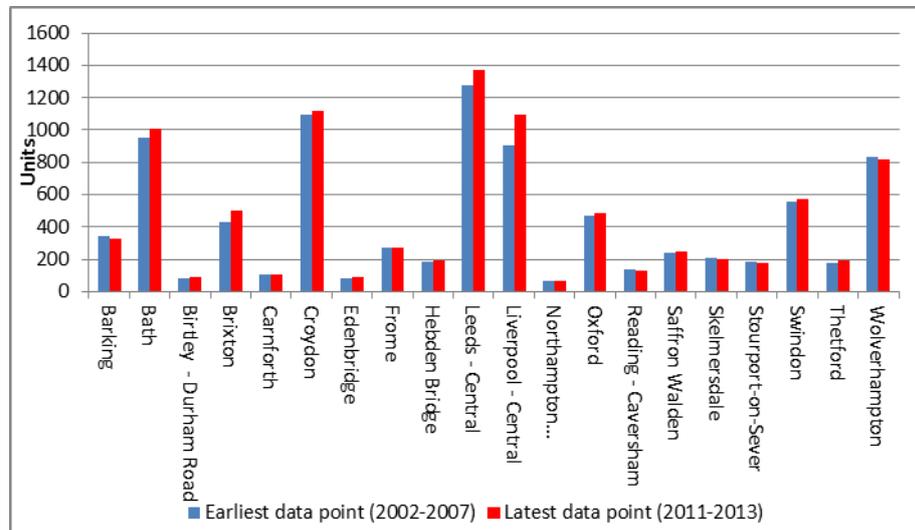


5.8 Trends in Centre Size

Two variables have been examined to understand the evolution of the size of the sample of town centres – the total quantum of floorspace, and the number of units. Both variables are as defined in Appendix D.

Figure 5.15 presents the change in the number of units over the survey period for the 20 centres. It suggests that, with the exception of Leeds and Liverpool, which have both seen unit numbers increase significantly (another result of their redevelopment), most centres have not experienced drastic expansion or contraction over the past decade.

Figure 5.15 The Evolution of Unit Numbers



Key finding

The size of the centres examined, as measured by both the number of units and total floorspace, has remained incredibly stable over the past decade

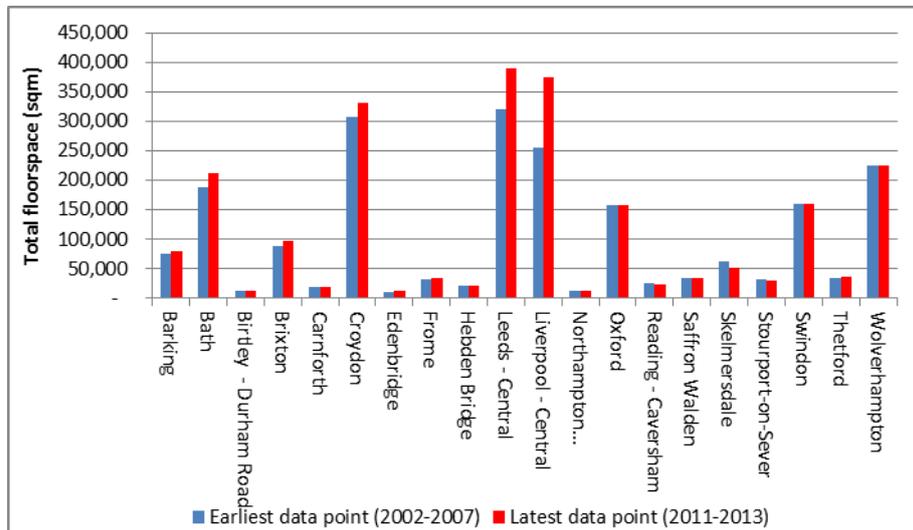
Six centres have experienced a reduction in the number of units, and although three of these are struggling centres situated in a weak local economic context, the other three are thriving against a mixture of economic backdrops, so the evidence of a relationship between centre success and the evolution of centre size over time is inconclusive.

Further, as **Figure 5.15** shows, where there have been reductions in size, they have been negligible in size. This could be evidence that planning restrictions reduce the potential for centres to flex their offer significantly in response to changing preferences; it could also help to explain persistent high vacancy rates within struggling centres over the survey period, if there is limited potential to change the use of a site when it becomes empty. The period the data covers is also relevant: the protracted period of sluggish economic growth post-2008 will have taken a toll on town centres' ability to renew their offer, by dampening demand for sites on the part of commercial investors.

It could be that, although the number of units has remained broadly stable, the size of those units, and therefore the size of the centre, has changed in response to changing consumer demands. This can be tested by looking at the evolution of floorspace. **Figure 5.16** shows how the quantum of floorspace

in each centre has changed between the date of the earliest survey, and the most recent.

Figure 5.16 The Evolution of Floorspace



The data shows little overall change in the quantum of floorspace across the sample, with the exceptions of Leeds and Liverpool, for the reasons described above. Taken together, the units and floorspace data strongly suggest that, with a couple of significant exceptions, the sample centres have undergone very little physical change over the past decade, regardless of their performance or popularity.

Key finding

Average unit size has also remained stable over time, suggesting that town centres have for the most part undergone little physical change over the past decade.

Plotting the total observed change in the number of units and the quantum of floorspace together, it is evident that the number of units has in general increased with the quantum of floorspace and vice versa, suggestive of little change in the mix of unit sizes within each centre. One notable exception to this rule is Barking, in which the quantum of floorspace has increased while the number of units has decreased – indicative of a consolidation of units and an increase in the average unit size.

Key finding

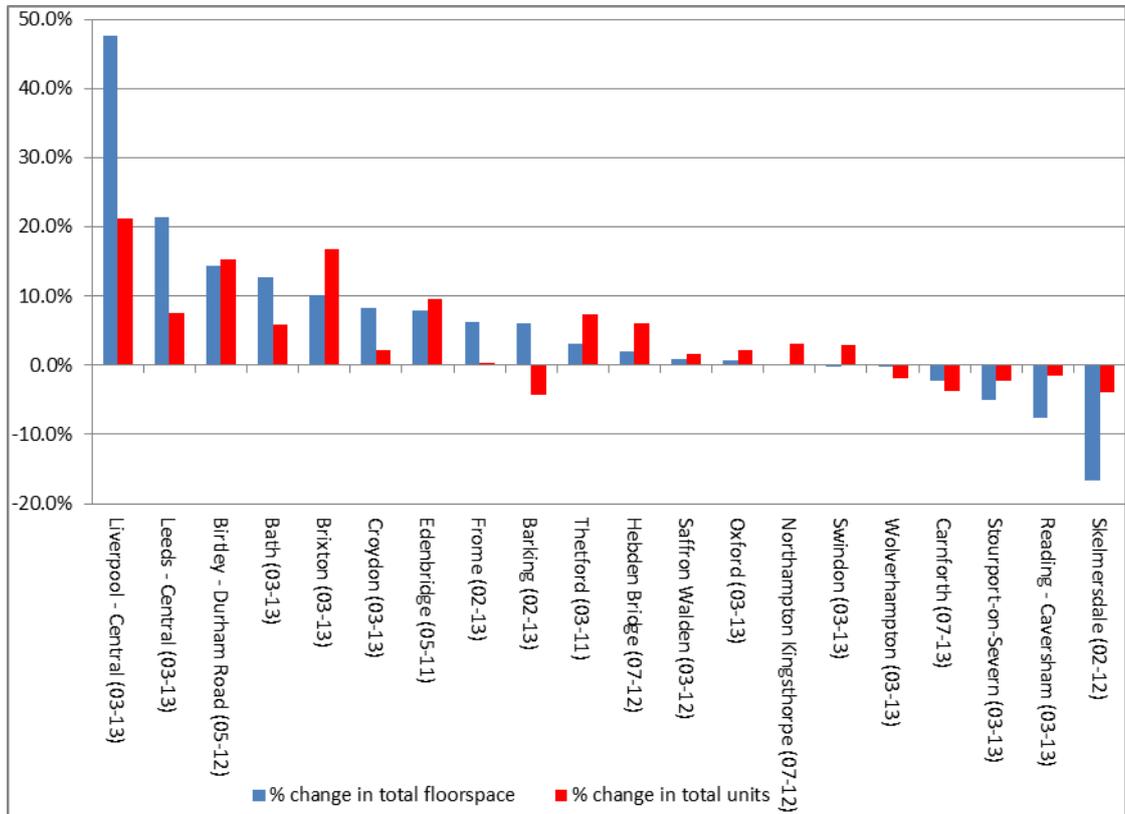
Large, successful centres have got larger, but overall the relationship between performance and physical change is ambiguous; some thriving centres have reduced in size.

The centre to have experienced the largest reduction in size – Skelmersdale – is a struggling centre in a weak local economic context. The other four centres to have experienced a reduction in size by both measures have exhibited varying levels of performance, and are situated in a range of economic contexts, so it is difficult to draw general conclusions about the reasons for the loss of floorspace. Reading Caversham, for example, performs extremely well by the catchment indicator, and is classed as a thriving centre in a strong economic context, but experienced a reduction of 7.5% of its retail floorspace between 2003 and 2013. Carnforth is another thriving centre in a strong economic context, which has seen vacancy rates stay well below 5% since 2007, yet over the same period the number of retail units within the centre has fallen by 3.7%.

One explanation for successful centres reducing floorspace could be that freeholders and investors in those centres have been particularly responsive to fluctuations in demand, and acted quickly to renew the town centre offer. This could have helped to keep vacancy rates down and footfall up. In addition, often the property values in successful centres are such that, if demand is not there for retail or other town centre uses, vacant buildings will quickly be converted into residential or other uses.

The key lesson for policy makers of the observed trends in floorspace across centres is that conservation of space previously used for retail is unlikely to be successful at encouraging new retail activity. It may therefore be preferable to ensure that vacant retail space is quickly adapted for other uses, and to prioritise active use of premises, and the footfall benefits that brings, over the preservation of space previously required for retail.

Figure 5.17 Total Change in Floorspace and Number of Units



The data strongly suggests that once a large centre achieves ‘critical mass’, it enters a virtuous cycle of growing catchment size, expanding retail provision, and increasing emphasis on comparison goods spending. The centres within the sample for which this is true are Liverpool, Leeds, Bath and, to a lesser extent, Oxford. For such centres, the immediate economic conditions becoming increasingly irrelevant as they attract visitors from further afield (although in the long-term the causality runs both ways, and the town centre’s success makes a positive contribution to the economy of the surrounding area).

6 A Typology of Town Centres

6.1 Introduction

The data analysis described in the preceding chapters provides some insight into the extent to which centres share common traits, and the relationship between those traits and performance. In this chapter, that analysis is combined with on-the-ground experience of town centre characteristics to propose a typology of town centres, with each type of centre potentially requiring a distinct policy approach.

It is important to note that not all centres will fit neatly into the typology based purely on their data. For the performance indicator in particular, the data produces anomalies. As an example, the performance indicator suggests that Frome is under-performing, but the main driver of this result is the relatively large quantum of floorspace the average charity shop occupies in the centre. On-the-ground experience of Frome suggests that charity shops tend to occupy the newer, larger and less desirable units, with the smaller, older units with more character being occupied by independent boutiques. Relatively large charity shops are not therefore an indicator of the centre's performance in this case, meaning Frome should not be placed in a category where under-performance is a characteristic.

Below each of the four types of centre is described, with cross-references to the preceding sections where the result was derived. A table summarising the typology by the five indicators is then presented.

6.2 Type 1 Centres: Large, homogeneous, thriving

The key feature of this type of town centre is its homogeneity: retail accounts for the majority of the offer, with cultural and leisure spending being for the most part an addendum, although it is likely to enhance the centre's attraction (see **Section 4.4**). Shoppers visit for the choice of comparison goods – convenience goods are not a necessary component of the offer (**Section 5.3**).

The immediate economic context is less relevant for these centres, as they attract shoppers from a wide radius (**Sections 4.2** and **5.3**). They have low, stable rates of vacancy (**Section 5.5**), and are increasing in size over time as their popularity with shoppers attracts new investment (**Section 5.6**).

Centres falling into this category from the town centre sample include Leeds, Liverpool and Bath.

6.3 **Type 2 Centres: Medium-sized to large, diverse, struggling**

Type 2 centres have a smaller catchment size than Type 1, meaning the economic context in which they operate has more of a bearing on their success (**Section 5.3**). For Type 2 centres this context is generally weak, and since they tend to have a relatively large quantum of available A2 floorspace, high vacancy rates are the norm, suggesting that planning or policy constraints are limiting the ability of this type of centre to respond to reduced demand and release space to other uses (**Sections 5.5 and 5.6**).

The financial crisis and recession that followed it have exacerbated the problems experienced by this type of centre (**Section 5.5**), and it could be that the gains made by the largest, 'destination' centres post-crisis have come at their expense, with retailers increasingly choosing to concentrate their physical retail offer in high-footfall, low-risk locations.

Type 2 centres are more diverse than Type 1, with non-retail spending constituting a larger proportion of total spend, though this is likely to be a reflection of the low-value nature of the goods on offer, rather than high spending on other activities (**Section 4.4**).

Centres falling into this category from the sample of town centres include Croydon and Dewsbury.

6.4 **Type 3 Centres: Small to medium-sized, weak local economic context, struggling**

The key characteristic of Type 3 centres is the nature of their decline; they have tended to have high vacancy rates for many years, with the post-crisis recession having only a marginal impact (**Section 5.5**). These centres tend to be convenience goods-driven, with a relatively small comparison goods offer (**Section 5.3**). They serve the local community rather than having a catchment that extends over a large geographical area, and the context in which they operate tends to be weak (**Section 5.3**).

An example of a Type 3 centre from the sample would be Birtley Durham Road.

6.5 **Type 4 Centres: Small, strong local economic context, thriving**

The small, successful centres that fit into Type 4 tend to sit within strong economic contexts. They 'punch above their weight' when it comes to their comparison goods catchment, but are more reliant on local custom for convenience revenue (**Section 5.3**).

They can be characterised as ‘destinations’, attracting visitors for the experience of spending time there as much as for the goods on offer, though they offer quite a different experience to Type 1 centres, attracting a range of spending, with leisure and cultural spending being a relatively important source of revenue (**Section 4.4**). They have emerged from the recession relatively unscathed.

There is tentative evidence from the data that this type of centre has been able to respond more effectively to reduced demand for high street retail by reducing the quantum of retail floorspace (see **Section 5.8**) – if true more widely, this is likely to have contributed to vacancy rates remaining low in the face of recent economic volatility.

Examples of Type 4 centres from the sample include Frome and Saffron Walden.

Table 6.1 A Typology of Town Centres

	Type 1: Large, homogeneous and thriving	Type 2: Medium-sized to large, diverse and struggling	Type 3: Small to medium-sized, weak local economic context, struggling	Type 4: Small, strong local economic context, thriving
Performance	High-performing, with vacancy rates tending to be below 10%. Vacancy rates have been stable over the recent past (except for periods of regeneration), with minimal observed impact from the recession.	Under-performing, with high vacancy rates. Vacancy rose post-recession, suggestive of a consolidation of the largest centres post-crisis at the expense of medium-sized centres.	Under-performing, with persistently high vacancy rates which seem relatively impervious to the economic cycle.	High-performing with low vacancy rates, which felt little impact from the 2008-9 recession.
Local Economic context	Can be found in both weak and strong economic contexts: large catchment means that the state of the local economy is of secondary importance.	Economic context matters more than for large centres since their catchment is smaller. The economic context is generally weak.	Economic context is very relevant. The poor performance of the local economy is a driver of the performance of the centre.	Almost exclusively found in strong socio-economic contexts.
Size	Above-average in size: total floorspace in excess of 100,000sqm. These centres tend to be growing in size over time.	Medium centres generally between 20,000sqm and 50,000sqm and large centres below 150,000sqm.	Generally below-average in size, with small centres tending to be below 50,000sqm and medium-sized centres below 100,000sqm.	Below-average in size: below 50,000sqm.

	Type 1: Large, homogeneous and thriving	Type 2: Medium-sized to large, diverse and struggling	Type 3: Small to medium-sized, weak local economic context, struggling	Type 4: Small, strong local economic context, thriving
Catchment	Large catchment, with the offer focussed on comparison rather than convenience goods.	Medium-sized catchment, with a greater emphasis on convenience goods than the largest centres tend to have.	Below-average catchment for comparison goods, but a larger catchment for convenience goods.	Catchment sizes for both comparison and convenience goods are generally small.
Diversity	Offer tends to be homogeneous by the diversity indicator, with the majority of spending going on comparison retail, although these centres often have a leisure and cultural offer that contributes to their appeal.	Offer tends to be diverse, with non-retail spending a larger proportion of total spend than is the case in larger centres.	Offer tends to be homogeneous, with a relatively large proportion of spending on convenience goods.	Diverse, attracting a range of types of spending beyond retail.

7 Part 2: Local Policy Responses to Retail Trends

7.1 Introduction

The aim of this part of the research is to assess how well high street strategies in different areas are aligned with recent trends in the high street and the retail sector. It attempts to understand the implications for policy at national and local level, whether recent trends and changes have had differential impacts across different places, and how well local partners interact and collaborate to use common policy levers to tackle issues that impact across their local areas.

In order to understand the issues involved in detail, two geographical areas have been selected. For practical reasons Local Economic Partnership (LEP) geographical areas were chosen: Leeds City Region in the North of England and the Coast to Capital area in the South of England.

The Leeds City Region is the UK's largest economy and population centre outside London, generating 4% of national economic output and employing 1.3 million people. It covers the whole of West Yorkshire and parts of neighbouring North and South Yorkshire: the 11 local authority districts of Barnsley, Bradford, Calderdale, Craven, Harrogate, Kirklees, Leeds, Selby, Wakefield and York along with North Yorkshire County Council.

Coast to Capital is the Local Enterprise Partnership (LEP) for Brighton and Hove, Croydon, Gatwick Diamond, East Surrey, Lewes and West Sussex. The aim of the LEP is to deliver growth for this economically important area which includes the airport economy surrounding London Gatwick. It represents a population of 1.6 million people, and more than 79,000 businesses supporting in excess of 721,000 jobs.

Within each of these two LEP areas, five town centres were selected for detailed case study. These 10 centres were selected at random from the long list of 50 centres described in Part 1 of this research, and reflect a range of sizes and characteristics. The town centres selected were as follows:

- From Leeds City Region: Leeds, Harrogate, Dewsbury, Wombwell, Hebden Bridge
- From Coast to Capital: Croydon, Lewes, Horsham, Billingshurst, Newhaven

Figure 7.1 and **Figure 7.2** show the case study town centres on a map.

The strategies and town centre plans of each of the case study town centres have been examined in detail to see how well-aligned they are with each other, and with the typologies identified in the first part of the research. The aim of the exercise is to highlight examples of collaboration across the area, as well as to spot any apparent contradictions or examples of where greater collaboration may be beneficial.

In addition to the desk-top research, interviews have been held with various agencies with an interest in the case study town centres, in order to understand how each area is responding to the particular challenges faced by their centre, and what the subsequent policy response has been or will be. This has included interviews with the planning policy and economic development local authority officers, town teams, BIDS, Chambers of Commerce and business groups in each case study area, as well as the two LEPs themselves.

Figure 7.1 Leeds City Region Case Study Town Centres

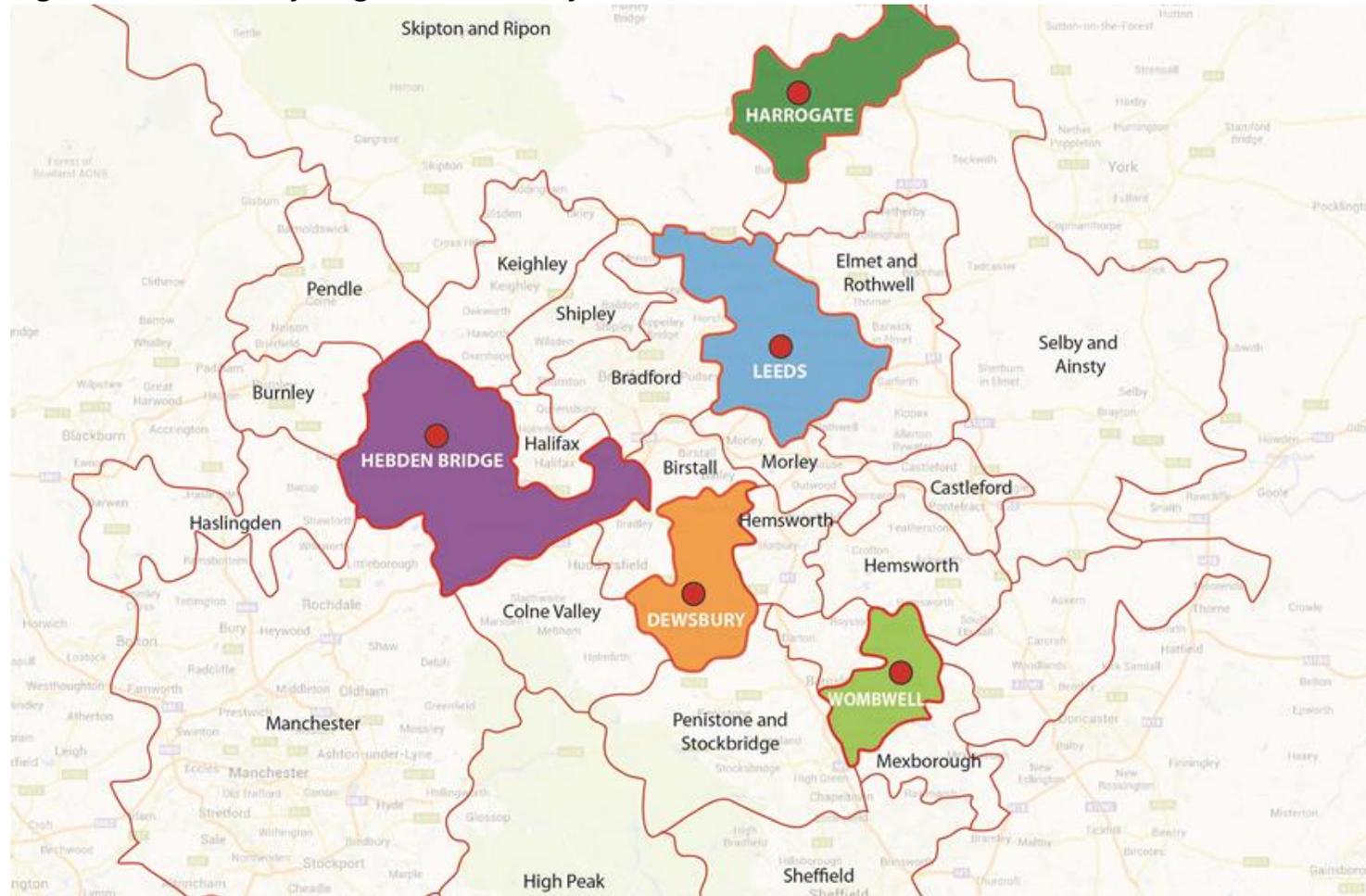
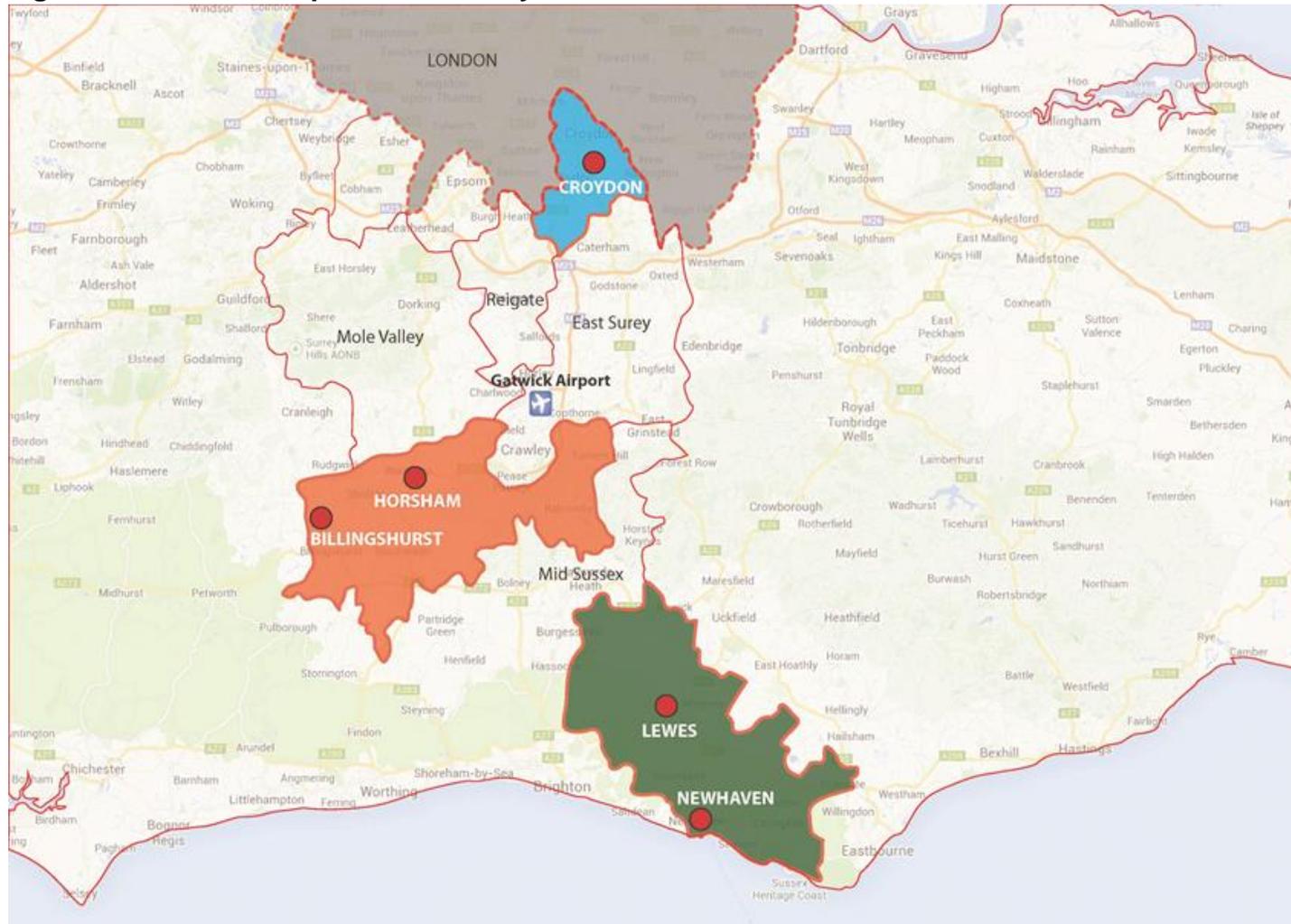


Figure 7.2 Coast to Capital Case Study Town Centres



7.2 Recent Trends

The key trends impacting on the UK's high streets are:

- changing consumer expectations, and a preference for a combined retail and leisure experience
- more 'mega' supermarkets with a large non-food offer and more recently a move towards smaller format 'convenience' supermarkets in town centres
- online shopping and multi-channel shopping (including in-store, online, click and collect)
- a rise in the popularity of out-of-town retail, particularly for larger purchases such as furniture and garden equipment
- an ageing demographic
- increasing homogeneity within and between centres
- difficult economic conditions, with consumers increasingly turning to discount stores

7.3 Policy Responses

There have been a number of suggestions as to what the policy response should be in reaction to the trends listed above. These include:

- Improvements to parking, for example two-hour free parking in town centres. This should be considered in conjunction with improvements in public transport accessibility and encouraging local journeys by walking or cycling
- Flexible use-class orders/special planning areas in town centres to allow easier transition from retail to other uses
- Related to the above, encouraging a mix of uses in town centres including housing, business, and leisure, and encouraging evening and night time as well as daytime economies
- More proactive use of Compulsory Purchase Orders and site assembly to bring together town centre sites/obsolete retail stock and provide premises that are commercially attractive to operators

- Introducing measures to deal with negligent landlords e.g. Empty Shop Management Orders
- Promoting inclusion of the high street in Neighbourhood Plans
- Supporting community use/temporary use of empty properties e.g. Meanwhile Uses or pop-up shops
- Making libraries digital hubs and promoting use of digital technology in town centres
- Concentrating retail in core retail areas/reducing overall retail floorspace (i.e. by relocating successful businesses to town centres and releasing secondary areas for residential development)
- Encouraging the formation of a Town Centre management and decision making partnership responsible for delivering town centre plans.
- Creating a unique sense of place, including an improved public realm, making the most of unique assets and heritage, and enhancing safety and security
- Place marketing and branding
- Using new forms of public/private investment such as Tax Increment Financing to leverage funding into high streets
- Ensuring retail diversity and a complementary retail offer
- Local authorities working together to share knowledge and best practice

7.4 **Recent national policy changes**

Several Government departments have recently announced legislative changes aimed at improving the performance of town centres.

National Planning Policy Framework

A new overarching document setting out the Government's planning policies for England was published in March 2012. This maintains the previous approach to town centre development, which priorities the town centre above other locations for retail, leisure and office uses but requires applications to be

judged on the impact on investment in affected centres and the impact on town centre vitality and viability, including consumer choice and trade.

It also contains a requirement to plan positively for the provision and use of community facilities and local services to enhance the sustainability of communities, including guarding against the loss of valued facilities and services and ensuring that shops and services are able to develop in a sustainable way.

A full review of NPPF is provided in Appendix A of this report.

2013 Autumn Statement and Budget

The Autumn Statement introduced business rate discounts, which are predominantly targeted at small businesses. Discounts for lower-rate premises were introduced for the period 2014-2016, while the doubling of the Small Business Rates Relief was extended to April 2015.

Half a million pounds of government loan funding was allocated for BIDs, and community-led renewal is being supported by the government by the 'Love Your Local Market Campaign'. There were also announcements regarding consultation on car parking policies.

Planning legislation has been changed to enable landlords to use empty properties more flexibly; to allow landlords to lease for shorter periods; to support start-up businesses wishing to open premises on the high street; and to relax change-of-use legislation.

The 2014 Budget also highlighted forthcoming developments to change-of-use legislation. The government has plans to consult on its proposal to create a much wider retail use class, though it would exclude betting shops and payday loan uses. The Budget also included proposals to allow a wider range of commercial buildings, such as warehouses and light industrial buildings, to be converted into residential properties.

Permitted development rights

In May 2013, the government made changes to the permitted development rights to make it easier for a retail use class premises to change its use to e.g. a restaurant or bank. The aim of the change is to increase high street footfall, lower the vacancy rate and increase the diversity of town centres.

Betting shops

At the end of April 2014, the Department for Culture, Media and Sport announced greater powers for local authorities to control the prevalence of betting shops. The change is expected to include moving betting shops into a use class of their own (or keeping them within the A2 use class and moving all other uses into a separate use class) and requiring planning permission before a betting shop can open.

8 Case Studies

8.1 Introduction

The data characteristics of the 10 town centres selected for case study, and where they fit within the typology of centres set out in **Section 6**, is summarised in **Table 8.1**.

As discussed in **Section 6.1**, the data does not always imply a neat fit with the typology; where this is the case, the reasons for selecting a given category, based on knowledge of the centre, and the driver(s) of the anomalous data result, have been described.

Having described the centres in relation to the typology, the experiences, challenges and policy responses in relation to each type of centre are then examined in more depth. The concluding chapter sets out a range of recommended policy responses and interventions at the national and local level, including the role for LEPs, Town Centre Managers, BIDS, Chambers of Commerce and business and community groups.

Table 8.1 Data Analysis of 10 Case Study Centres

	Performance	Local Economic Context	Diversity	Size	Suggested Typology
Leeds - Central	<i>Over-performing</i> Charity shops are relatively small; below-average charity shop floorspace	<i>Average context</i> Managerial employment is above-average; unemployment is below average; this is balanced by high levels of long-term inactivity and low income	<i>Diverse</i> Above-average proportionate spending on cultural activities, alcoholic drinks and takeaway meals	<i>Large</i>	Type 1: Large, homogeneous and thriving Although Leeds is closest to a Type 1 centre, it also offers a diverse range of leisure and cultural activities, which contribute to its success as a retail destination
Harrogate	<i>Over-performing</i> Below average charity shop prevalence; low vacancy rate	<i>Strong context</i> Employment indicators all point to a strong local labour market; the only negative sub-indicator is average income	<i>Homogeneous</i> Higher than average proportion of multiple retailers; higher than average proportion of comparison spending	<i>Large</i>	Type 1: Large, homogeneous and thriving
Dewsbury	<i>Under-performing</i>	<i>Weak context</i>	<i>Diverse</i>	<i>Medium</i>	Type 2: Medium-sized to large,

	Performance	Local Economic Context	Diversity	Size	Suggested Typology
	Above-average vacancy rate; above-average charity shop prevalence	Key negative sub-indicators are long-term sickness and disability, and average income	Higher than average proportion of non-multiple retailers; higher than average proportion of comparison, cultural, restaurant and alcoholic drinks spending		diverse and struggling
Wombwell	<i>Over-performing</i> Vacant shops are relatively small; below average vacancy rate	<i>Weak context</i> All sub-indicators are negative, suggesting broad-based economic weakness	<i>Diverse</i> Higher than average proportion of convenience, cultural, restaurant , alcoholic drinks and take away meals spending	<i>Small</i>	Type 4: Small, strong local economic context, thriving Although the centre has a weak socio-economic context, experience suggests it is performing its core function well under challenging circumstances.

	Performance	Local Economic Context	Diversity	Size	Suggested Typology
Hebden Bridge	<i>Under-performing</i> Above-average charity shop floorspace	<i>Strong context</i> Labour market sub-indicators are all above-average, with skilled employment being significantly above the English average. Average income is the only sub-indicator with a negative value	<i>Diverse</i> Higher than average proportion of non-multiple retailers; higher than average proportion of comparison spending; lower than average proportion of cultural, restaurant and take away meals spending	<i>Small</i>	Type 4: Small, strong local economic context, thriving Does not fit neatly into the typology purely looking at the data – above-average vacancy rate and relatively large charity shop spaces mean it is classed as under-performing by the indicator. However, experience on the ground suggests this is an anomaly in the data, and that it is a thriving centre – putting it into Type 4.
Croydon	<i>Under-performing</i> Below average charity shop floorspace; vacant units are relatively large; above average vacancy rate	<i>Strong context</i> Labour market sub-indicators are all positive, and income is above-average	<i>Homogeneous</i> Higher than average proportion of multiple retailers; lower than average convenience, cultural and alcoholic drinks spending	<i>Large</i>	Type 2: Medium-sized to large, diverse and struggling Does not fit neatly into the typology purely looking at data. Experience on the ground suggests Croydon has a good diversity of uses, in spite of the high proportion of chain stores (which mean it is classed as homogeneous by the diversity indicator). If classed as diverse, it fits into Type 2.

	Performance	Local Economic Context	Diversity	Size	Suggested Typology
Lewes	<p><i>Over-performing</i></p> <p>Below average vacancy rate; vacant units are relatively small</p>	<p><i>Strong context</i></p> <p>Strong labour market, and above-average income levels</p>	<p><i>Homogeneous</i></p> <p>Higher than average proportion of non-multiple retailers, offset by a relatively homogeneous mix of spending</p>	<i>Medium</i>	<p>Type 4: Small, strong local economic context, thriving</p> <p>Does not fit neatly into the typology, primarily because the diversity indicator suggests it is homogeneous, while the size categorisation suggests it is a medium rather than a small centre.</p> <p>Experience on the ground suggests it has a thriving independent sector, however, and that although it is technically medium-sized, it is in fact relatively small for that category (64,000sqft).</p>
Horsham	<p><i>Over-performing</i></p> <p>Vacant units are relatively small; below average vacancy rate</p>	<p><i>Strong context</i></p> <p>Strong labour market, and above-average income levels</p>	<p><i>Homogeneous</i></p> <p>Higher than average proportion of multiple retailers</p>	<i>Large</i>	<p>Type 4: Small, strong local economic context, thriving</p> <p>Horsham is above-average in size according to the size indicator. However, this is likely to be a consequence of the centre retaining B1 uses, demand for which is dwindling. By retail catchment, it is a</p>

	Performance	Local Economic Context	Diversity	Size	Suggested Typology
					small centre.
Billingshurst	<i>Under-performing</i> Above average charity shop floorspace; vacant units are relatively large; above average vacancy rates	<i>Strong context</i> Labour market indicators for the area are positive, and incomes are above-average	<i>Homogeneous</i> Relatively low convenience and take away meals spending	<i>Small</i>	Type 3: Small to medium-sized, weak local economic context, struggling Does not fit neatly into any typology purely looking at data. It scores negatively on all four performance variables, but is set within a strong economic context, meaning it is not an obvious fit with either Type 3 or Type 4. The immediate economic context is likely to be weaker than the indicator suggests, meaning it is a Type 3 centre.
Newhaven	<i>Under-performing</i> Above average vacancy rate	<i>Strong context</i> Mixed sub-indicators: local long-term inactivity	<i>Diverse</i> Higher than average proportion of non-multiple retailers;	<i>Small</i>	Type 3: Small to medium-sized, weak local economic context, struggling Does not fit neatly into any typology purely looking at data, although

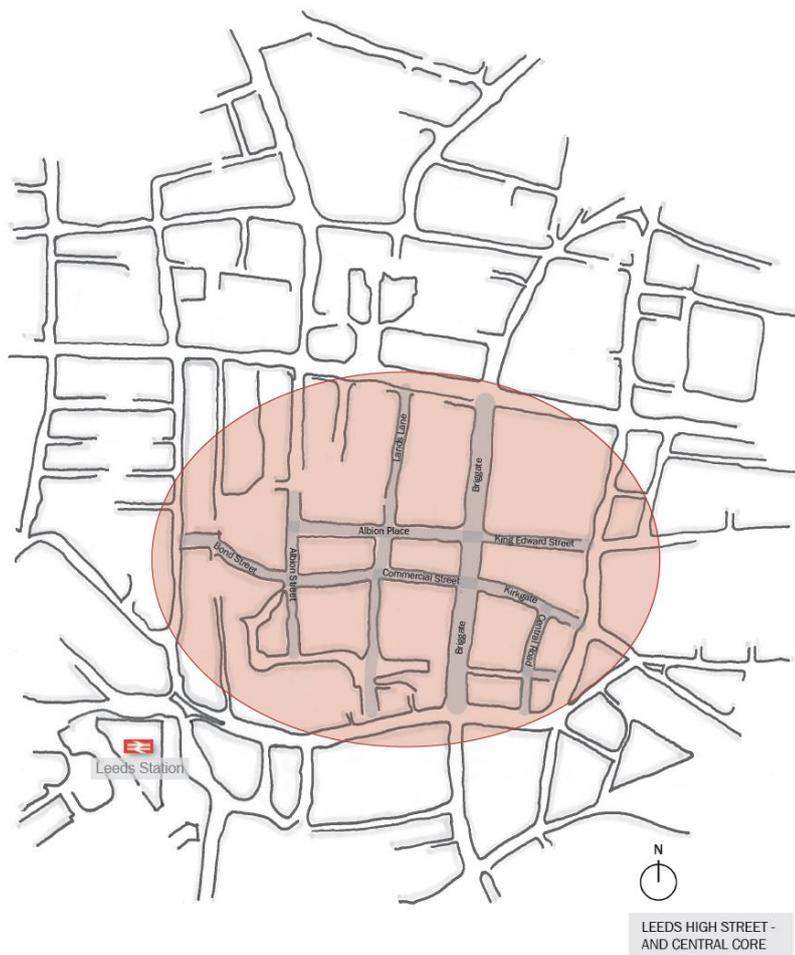
Policy implications of recent trends in the high-street/retail sector

	Performance	Local Economic Context	Diversity	Size	Suggested Typology
		through sickness and disability is above-average; other employment sub-indicators are strong, while incomes are above-average	relatively low comparison spending		positive socio-economic context score is driven primarily by a very low rate of unemployment. Experience on the ground suggests that the immediate economic context is weaker than the indicator suggests, placing the centre in Type 3.

8.2 Type 1 Centres: Large, homogeneous, thriving

Leeds

Figure 8.1 Leeds City Centre



Context

Leeds city centre has seen significant investment in its retail and entertainment offer in recent years, with several developments acting as catalysts in growing the city centre economy (notably Trinity Leeds Shopping Centre and the First Direct Arena). The city's vibrancy and appeal is attributed to its diverse offer, having distinct retail, office, leisure and cultural quarters in

the city centre. This demarcation of the primary uses minimises conflicts of interest from the different users of the city centre.

Leeds' vitality can also be attributed to its position at the top of the local hierarchy, attracting workers and visitors from within the city region and beyond. The size of the workforce in Leeds brings footfall into the city and supports its diverse leisure, culture and entertainment offer. In general, Leeds out-competes other town and local centres in the city region, such as Bradford, Wakefield and Dewsbury.

The primary shopping quarter (PSQ) in Leeds has remained relatively compact despite expanding in size and moving further to the east over the past few decades. The PSQ is comprised of seven shopping centres and arcades, pedestrianised streets, markets, and a good balance of multiples, independents, and retailers catering to different markets. There are significant forthcoming developments to Leeds' retail offer, from Victoria Gate to the Townscape Heritage Initiative (THI) on Lower Kirkgate and refurbishment of Kirkgate Market.

Pedestrianisation of much of the PSQ, along with the Trinity Leeds Shopping Centre, Victoria Quarter and forthcoming Victoria Gate developments have successfully revitalised Leeds' retail offer. These developments are primarily focused on high-end retail and have attracted new retailers to the city. In 2012 when Trinity Leeds Shopping Centre was being constructed it was the largest retail development in Europe. Additionally, the forthcoming Victoria Gate development opening in 2016 will secure an anchor John Lewis store as well as 120 units targeted at high-end retailers.

Figure 8.2 Leeds Retail Catchment Area¹⁹

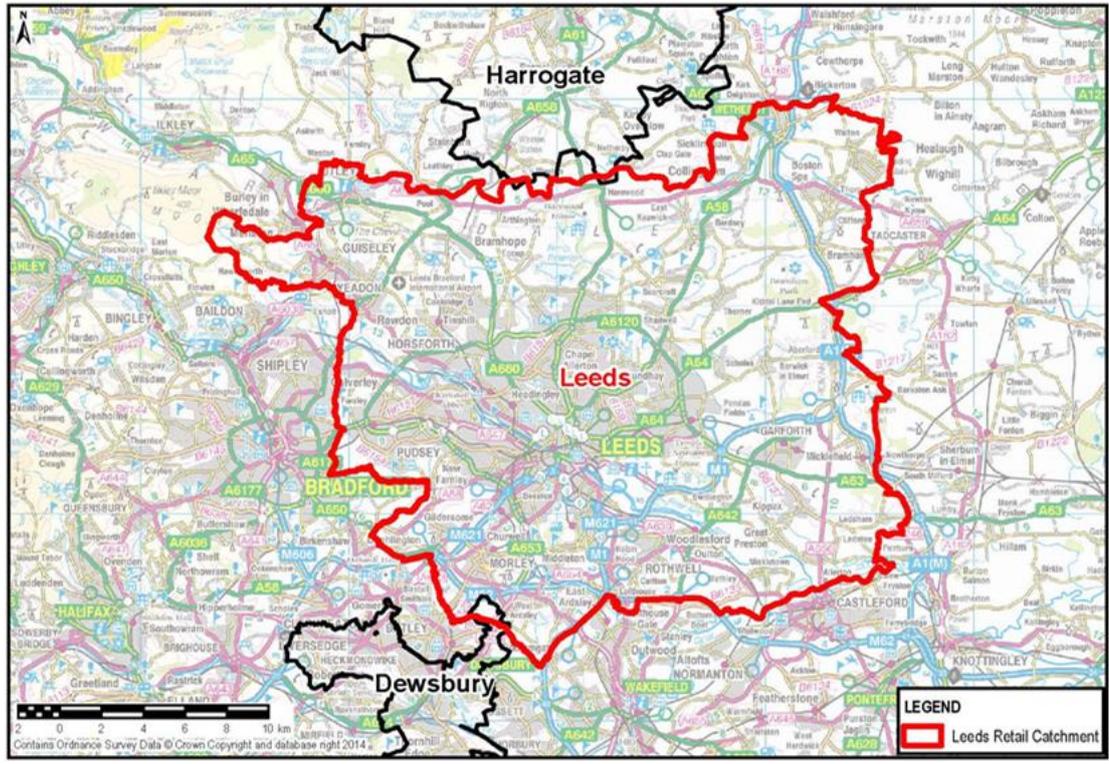


Figure 8.3 Leeds City Centre and Trinity Leeds Shopping Centre



¹⁹ The retail catchment areas used throughout Part 2 of this report are based on market share analysis and shown as the geographical area within which a proportion of the turnover for each centre is derived.

Whilst Leeds city centre remains one of the top retail destinations in the UK it has fallen in the rankings over the last five years; the 2009 recession had a notable impact that persists in some areas. Vacancy rates in the city centre are more acute in some locations, particularly in the lower value shopping destinations.

In localised areas where vacancy is an issue there are accounts of increasing change of use applications and an increase in the number of betting shops, charity shops and other similar uses. Temporary uses of vacant units have been encouraged in Leeds and when vacancy rates were highest during the recession, art and cultural exhibitions were encouraged to make use of some of the empty units.

The impact of Trinity Leeds Shopping Centre on other retail areas is being monitored carefully to determine whether it is displacing activity. To date, it does not appear to have had an impact on vacancy rates but there are changes of use applications in other retail areas that may be associated with the development. Footfall patterns have also changed with the opening of Trinity Leeds Shopping Centre; however, those areas reporting declining footfall have in general been experiencing the trend for several years.

Policy

The **Draft Core Strategy** (Leeds City Council, Feb 2012) puts forward a strategic long-term vision while recognising short term priorities such as reduced demand for retail floorspace caused by declining shopping expenditure and competition with online retailers. One solution to this is to diversify the mix of uses away from retail, and the document includes the policy objective of accommodating 665,000sqm of office floor space, and 10,200 residential dwellings, within the centre. The policies also dictate acceptable uses in and on the edge of town centre areas, which ensures a diverse offer whilst maintaining 80% retail use in primary frontages. In particular, the strategy includes policies which limit the development of retail outside of the primary shopping centre.

The Core Strategy built on the **adopted 2011 Growth Strategy** which highlights the council's priorities for delivering growth and the key opportunities for the city. The spatial focus is primarily concerned with the existing city centre though key developments in edge of centre locations, such as Victoria Gate, are recognised as being important opportunities for employment land and drivers of growth.

With seven priority sectors covered in the strategy it is clear that the council has a holistic view of Leeds' economy and the key opportunities and challenges facing each sector. Retail is one of the priority sectors and the strategy acknowledges the contribution it makes to employment and output, though the city's recent decline in the rankings is recognised. Retail policies have the objectives of delivering key developments such as Trinity Leeds Shopping Centre and Victoria Gate, improving workforce skills, and creating a distinctive retail offer with opportunities for small and independent shops and traders. The strategy states that retail should not be displaced and moved to new locations but instead should be grown across the city centre (and in secondary areas).

Strengthening the cultural and leisure offer of the city is a priority in the Growth Strategy, and is an important attraction to visitors and investment. Leeds' existing cultural and leisure offers are recognised as being contributors to the city's success.

Another evidence base report feeding into the Core Strategy is the **Leeds City Centre, Town and Local Centres Study**, commissioned in 2011 to develop an understanding of the characteristics, performance and issues facing the centres within the district as well as the use of and demand for retail and leisure.

The study undertook a health check of centres and whether they are exceeding, meeting or failing in their role in the hierarchy of centres in Leeds. The study highlighted that the economic and retailing context were adverse, and consequently raised uncertainties over the prospects for retail and especially for high streets. It was acknowledged in the study that retail and leisure have faced significant structural change, exacerbated by the economic downturn.

The study concluded that the retail and leisure sectors are particularly location-sensitive, existing in an inter-dependent business ecosystem. The study supports adaptive policies, and recommends that the retail and leisure sectors be monitored in order to ensure that policies keep pace with circumstances, and that appropriate needs are identified.

Leeds City Council recognised that a diverse retail offer is one of its key strengths and as such it undertook the **2013 Indie Street Study** to support the independent retail sector. The study makes recommendations to support the independent retail sector whilst responding to the changing dynamics of retail. In particular, e-commerce, incubation and start-up support were identified as areas important to the independent sector.

Response to Challenges

The consultation with stakeholders highlighted the view held by the council that Leeds' strengths and success are largely due to its diverse composition and offer to both residents and visitors. It is recognised that maintaining a balance of retail, office, leisure and cultural uses is vital for the future success of the city centre and the wider city region. Ongoing improvement to the leisure offer of Leeds this remains a key priority for the city council to develop over the coming years. Street theatre, events and markets are acknowledged as being important for enhancing the overall leisure and cultural offer of a town centre.

The importance of Leeds city centre as the focal point for the city region was also a common theme. Within the Leeds City Region there is a clear hierarchy of retail centres with Leeds at the top with a large catchment area and other towns and cities (York, Bradford, Wakefield, Kirklees, Calderdale and Harrogate) offering distinct specialisations which complement Leeds' offer and also cater to a local market.

Harrogate's conference centre, for example, attracts national and international business travellers into the town and offers high end retail, arts and crafts and antiques. York has a distinct heritage offer. The other towns, which do not have the strong visitor sector of York and Harrogate, such as Halifax, Huddersfield and Bradford, are the focus of plans to strengthen other sectors in the town centres such as administration and financial services and investment in town centre regeneration including bringing buildings and assets back into public use. The retail sector in the Leeds City Region therefore represents a good example of how neighbouring cities and towns can complement the economic core rather than compete with it.

New permitted development rights meaning office space can be more easily converted to residential uses are not widely welcomed. It is felt that this is potentially damaging to town centre vitality, since it could reduce the working population of the centre and ultimately make it less economically prosperous.

Greater devolution of statutory and financial responsibilities was seen by all stakeholders as the most effective way to ensure that Leeds city centre and the city region receives the tailored funding and policy support it needs.

There are examples of good practice by Leeds City Council, particularly in recognising trends and issues facing retail, working to diversify the type of space on offer, and engaging with businesses and developers. Despite annual funding uncertainties, Leeds City Council has capitalised on private sector investments where possible by coordinating public investment to improve the quality of offer in the city centre. For example, a Townscape Heritage Initiative

and £12m of refurbishment works around Kirkgate Market will be aligned with the neighbouring Victoria Gate development.

Harrogate

Figure 8.4 Harrogate Town Centre



Context

Harrogate is a regionally and nationally important destination for leisure and business tourism. The town centre acts as the central hub for the district and has a local catchment as well as appealing to shoppers further afield for its specialised retail and tourism offer. Harrogate's attractions include its heritage, high-end retail offer and reputation for quality service.

Whilst Harrogate is in proximity to Leeds, it does not directly compete with the hub of the city region. Instead Harrogate performs a unique role in the city region hierarchy and provides a distinct offer in contrast to that offered by

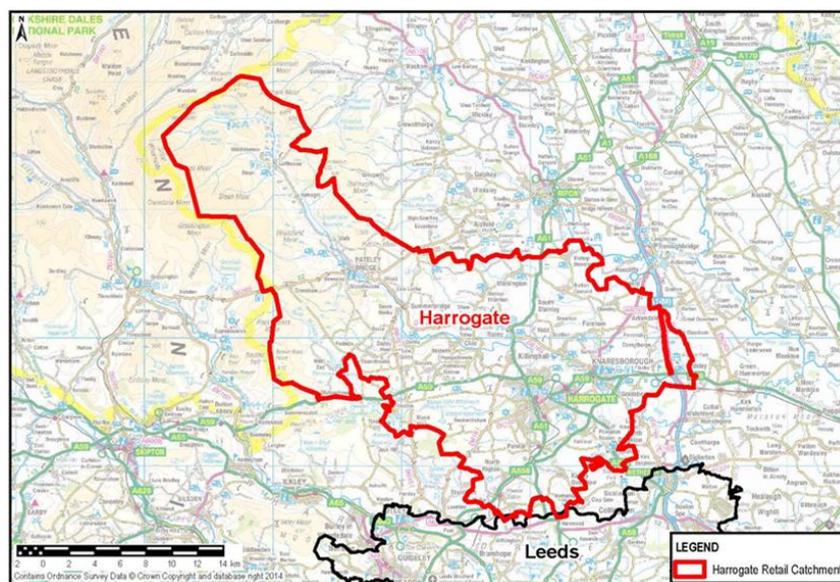
Leeds. Furthermore, Harrogate's unique offer means that it does not face notable competition from other town and local centres.

The town centre of Harrogate is compact. The leisure and business visitor economy plays a significant role in Harrogate's prosperity and has had an important role in shaping the town's character over the years.

With much of the main retail area now pedestrianised, Harrogate has a vibrant atmosphere that is complimented by the balance between independent and multiple retailers and leisure providers. The majority of the retail and leisure offer is high-end and independent, targeted at affluent shoppers and visitors, while the mid- and low-end offers have a greater proportion of multiples. The town has several historic and/or family-run businesses that make important contributions to the offer and character of Harrogate.

The town centre has some spatial constraints, limiting further growth. The heritage of the town also places limitations on the nature of potential development. However, the station parade site offers significant development potential on the edge of the retail core, and it is expected that this site will be developed in the future to provide a mix of retail, leisure, office and residential uses.

Figure 8.5 Harrogate Retail Catchment Area



Harrogate has been performing well in recent years, and despite the impact of the recession on retail, has outpaced both regional and national growth. The recent rise of domestic tourism is likely to have been a key factor in the town's

resilience, as is its high-end retail and leisure offer. It is seen as complementary to neighbouring Leeds, as it offers a different experience for tourists and the local market and plays to its strengths as an attractive historic market town.

Whilst vacancy rates in Harrogate are low compared to national levels, a number of sites in prominent locations within Harrogate are currently vacant, although a number of these were in the process of redevelopment at the time of visiting.

Figure 8.6 Harrogate Town Centre



Policy Framework

The **2013 Sites and Policies Development Plan Document Draft** seeks to deliver the strategic planning policies of the Core Strategy.. It guides development in shopping frontages in primary areas, including measures to preserve the balance of retail and non-retail uses and limit developments that involve change of use. For changes of use from retail to non-retail, all applications are required to demonstrate that they have considered all alternative vacant units in the shopping centre and will only be approved if they can demonstrate that they would improve the vitality of the primary shopping area. The strategy emphasises the importance of preserving the character of primary shopping centres as they provide the greatest attraction to visitors and users which are key to the success and vibrancy of Harrogate and to its USP within the city region.

The Updated Economic Development Strategy 2010-2015 and Strategic Action Plan acknowledges the opportunities for Harrogate district in the

Leeds City Region and the employment generation it creates. The Strategic Action Plan also recognises the competition that Harrogate faces from high profile retail developments in Leeds and York and the impact this may have on retail spending in Harrogate. In terms of delivering the vision of the Economic Development Strategy, policies in the Strategic Action Plan largely relate to business and start-up support and growing the visitor economy. The retail vacancy rate is reported in the Economic Development Strategy and shows an improvement in recent years.

Adopted policies relating to Harrogate's town centre and the retail sector are contained in the **2009 Core Strategy** which is now out of date. Still relevant, however, is the recognition of the importance of the relationship with the Leeds City Region economy, in terms of building on the unique strengths of the town such as the business tourism sector and high end retail.

The strategy contains high level policies to support the district's economy, provide employment land, and support conference and business tourism. More specific policy aims to strengthen the role of Harrogate as a sub-regional town, including

- Expansion of Harrogate's main shopping area
- Additional food and retail floorspace
- Updating the transport interchange
- Enhancing office and hotel provision and town centre residential development
- Pedestrian and environmental improvements
- Management of parking.

The strategy has an objective to prevent the vacancy rate from rising above 7%, although it does not have specific measures to tackle vacancy. It does however recognise the importance of expanding the retail offer and bringing forward retail development in the face of competition from other areas such as Leeds and York. The strategy states that it will resist changes from retail to non-retail uses in all of the district's shopping centres. The strategy recognises the position of Harrogate within the region's hierarchy and that its existing USP and offer need to be retained and improved for it to remain a successful and vibrant centre.

Response to challenges

The current policy environment and interviews with stakeholders in Harrogate highlighted that engagement through a town centre management team is vital in mitigating issues and steering town centre development in a direction that meets the vision of both the local authority and local businesses. In Harrogate there is limited engagement between public and private stakeholders regarding the town centre and its management. National legislation and associated funding requiring local authorities to develop town centre management teams (ideally with a balance of private and public sector stakeholders) is seen as an effective means to resolve issues and identify opportunities in town centres. However this is expected to be addressed later in the year by work associated with the forthcoming retail and town centre strategies.

Whilst there are forthcoming strategies for Harrogate's town centre and retail sector all stakeholders highlighted that local policies need to reflect the unique characteristics and assets of each town centre, and therefore national policies are viewed as being limited in being able to address the needs of individual town and city centres.

The difficulty in responding to challenges and planning for the future of the town centre with a lack of up to date planning policy is an issue in Harrogate. Additionally, the local political context presents some barriers for the development of Harrogate's town centre and local authority budgets are viewed as limiting the ability of the council to facilitate growth. There are also issues with conflicting needs of the town and the more rural areas of the district.

Stakeholders raised the issue of business rates and the need to reform these nationally in a way that is mutually beneficial for both businesses and local authorities. The issue is a particular concern for independent and start-up businesses.

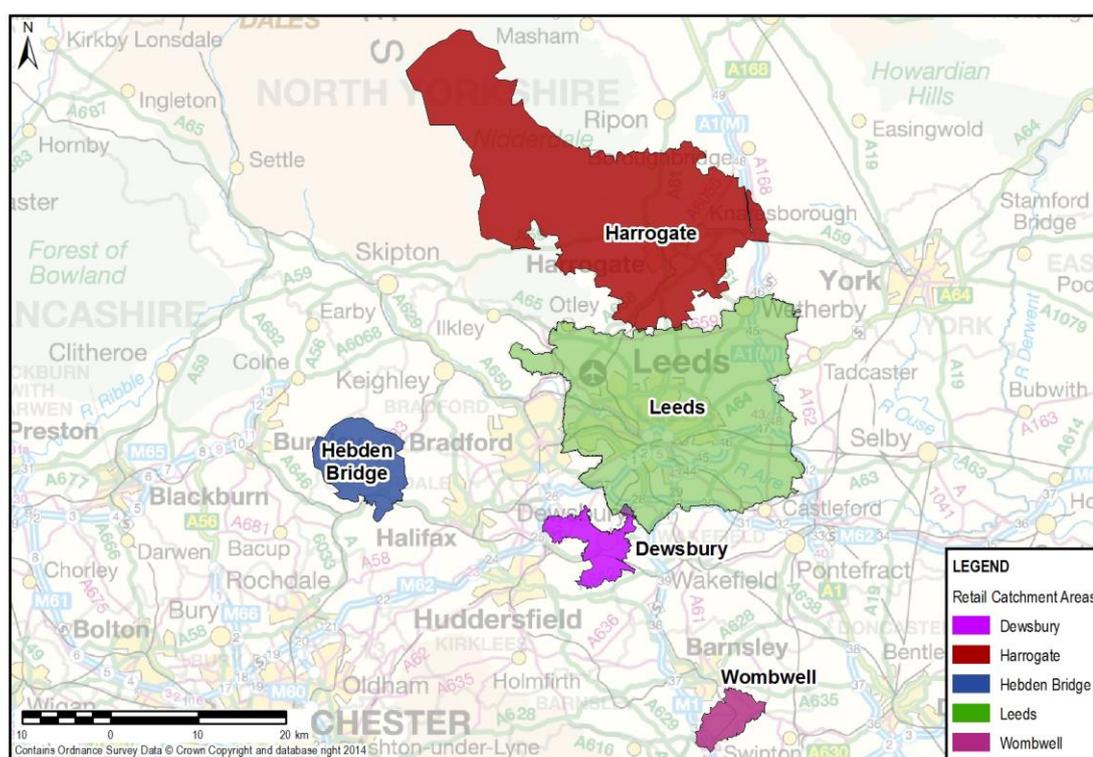
Stakeholders in Harrogate from both the public and private sector understand the important role of online media and technology and the impacts it has on retail and town centre vibrancy. This should be supported by policy, best practice guidance and funding to ensure that town centres are able to capitalise on opportunities and continually adapt to provide new services and meet technological expectations.

Recommendations for Type 1 Centres: Large, homogeneous and thriving

Large, thriving town and City centres such as Leeds and Harrogate are often the focus of a region, serve a wide catchment area and (although the data-driven analysis has grouped these areas as ‘homogeneous’ i.e. concentrating on comparison retail) they also fulfil a large number of functions beyond shopping, including leisure (day and night-time), business and cultural activities. Because of the strategic nature of these types of centres, the effects of the recent trends have been different from smaller towns, and the policy response has been different and will continue to be different in the post-recession era.

The Leeds City Region works well in terms of spatial interaction with complementary rather than competing offers. Leeds is the focus of the region with a large and growing retail, cultural and leisure offer, appealing to a wide range of consumers, including the younger demographic. Harrogate has forged a niche as a high-end retail destination appealing to an older local market and tourists, both leisure and business. The catchment areas of each of the towns in the LCR area are shown below. Leeds has the largest catchment in terms of population with Harrogate sharing a large proportion of the West Yorkshire market and reaching into the North Yorkshire rural areas.

Figure 8.7 Leeds City Region Spatial Interaction



case studies have found that decision makers have recognised trends and are supportive of adopting flexible policies to allow the town centres to adapt to a changing context. The main focus of strategies has been on delivering physical regeneration of key sites, while maintaining the vibrancy of the town centre. Stakeholders are aware of the importance of maintaining the diversity of the offer.

A culture of collaboration between agencies, such as LPAs, BIDS and town centre managers, and strong public-private partnership has been evident. There is no evidence of collaboration with other town centres outside of the local authority area, although with the centres of this type being generally over-performing, there is probably little incentive for policy makers to do so.

The collaboration of a range of agencies is particularly important to large centres, and sharing best practice with other large centres should be encouraged, ideally led at a strategic level by LEPs or similar regional bodies. As the high streets within these centres have a wider-than-local reach, neighbourhood planning is not necessarily an appropriate mechanism for bringing about change, although community involvement in decision making is beneficial.

Type 1 town centres have benefitted from changing consumer tastes, as they are able to offer both retail and leisure in one space. Large-scale, retail-led development – the result of planning policy moves to encourage town centre revitalisation – has also worked to Type 1 centres' advantage.

A well-designed programme of investment, enhancing the centre's heritage and unique assets, can add to a town's distinctiveness and sense of place, thereby encouraging more people to visit and shop²⁰.

With new permitted development rights meaning easier conversion of retail uses to residential, there is an opportunity to revitalise town centres of all sizes by reusing redundant buildings and bringing a new population into the town centre. However, decision-makers will need to look at the overall economic health of a town centre to ensure that essential local services are not affected and that the town centre provides an adequate supply of retail units to meet the needs of the population it serves and the aspirations of the town for the future as articulated in the town centre strategy.

Large centres are also benefitting from the recent proliferation of smaller-format convenience stores appropriate for town centre locations, which capitalise on the growing trend of 'top-up' shopping.

²⁰ New Economics Foundation, Reimagining the High Street, 2010

Figure 8.8 Type 1 Towns: Recommendations

Policy
<p><i>National</i></p> <ul style="list-style-type: none"> • Increase collaboration between town centres in an economic region, possibly coordinated by LEPs, for instance via town centre planner network to share knowledge and best practice • Promote flexible planning to allow for adaptation to local conditions, for example by making conversion of retail space to residential easier where appropriate
<p><i>Local</i></p> <ul style="list-style-type: none"> • Capitalise on unique heritage and assets to promote a distinct sense of place. Exploit planning obligations (CIL/Section 106 agreements) from large-scale town centre redevelopment schemes to improve the public realm and infrastructure • Diversify the offer: promote an increase in office, leisure and cultural uses, including the evening and night time economy to ensure footfall comes from a range of sources • Ensure the city centre offer continually improves and adapts to meet new needs, for example by making use of innovative technologies • Ensure a balance of retail, residential and other uses in the town centre to provide essential local services and support town centre aspirations • Include surveys of the needs and expectations of users within the town centre catchment as evidence for the town centre strategy in the local plan
Examples of good practice
<p>The Leeds City Region has relatively well-established ways of working across local authority boundaries, with neighbouring towns sharing the benefits of Leeds' success by presenting a complementary offer to consumers.</p>

Other initiatives to consider

- Engage multiple stakeholders in decision making regarding the town centre. This contributes to its success and allows investments to be capitalised upon by other developers
- Promote the use of ‘click and collect’ points within the town centre to encourage footfall
- Encourage free WiFi and the use of social media in marketing the town centre

National: Central Government (DCLG, BIS, HM Treasury)

Local: Local Planning Authorities, LEPs, BIDS, town teams, town centre partnerships/managers, chambers of commerce, neighbourhood planning groups

8.3 Type 2 Centres: Medium-large, diverse, struggling

Croydon

Figure 8.9 Croydon North

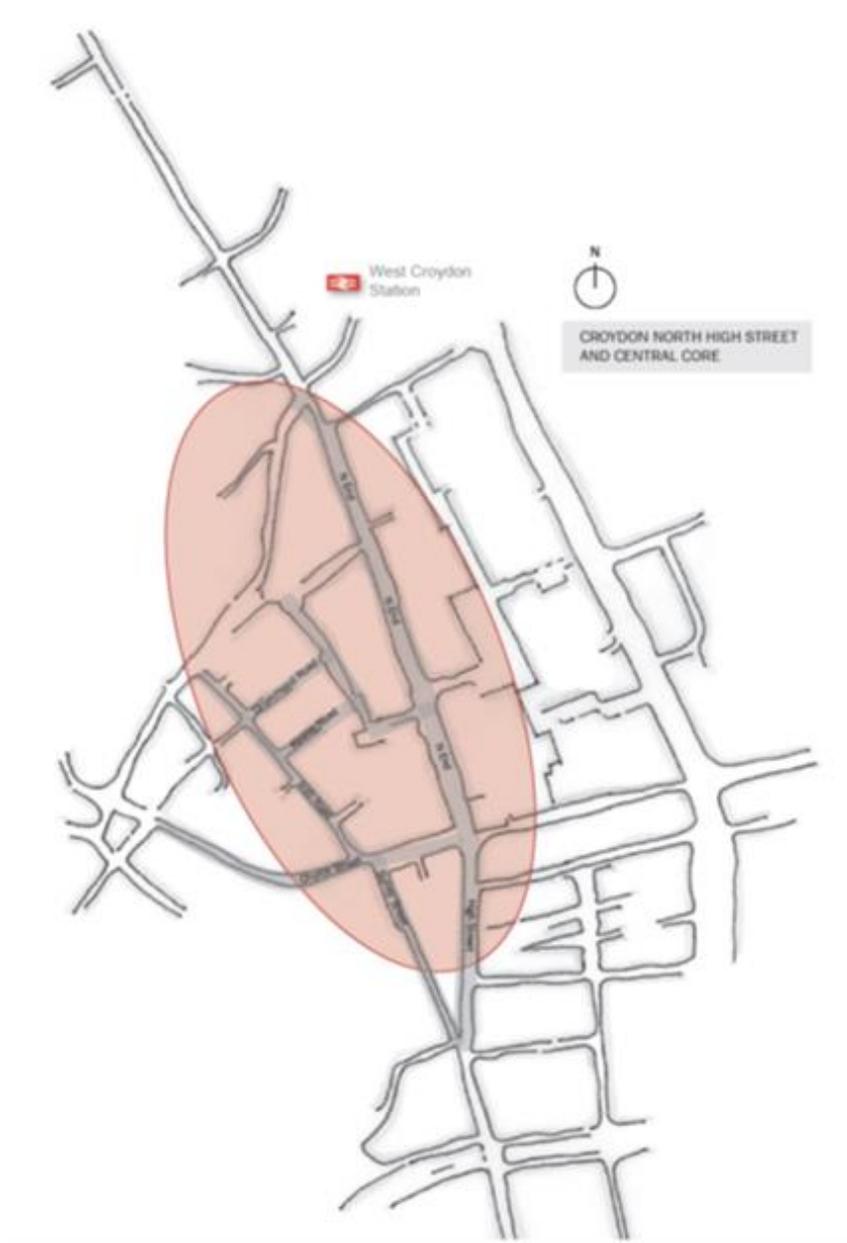


Figure 8.10 Croydon South

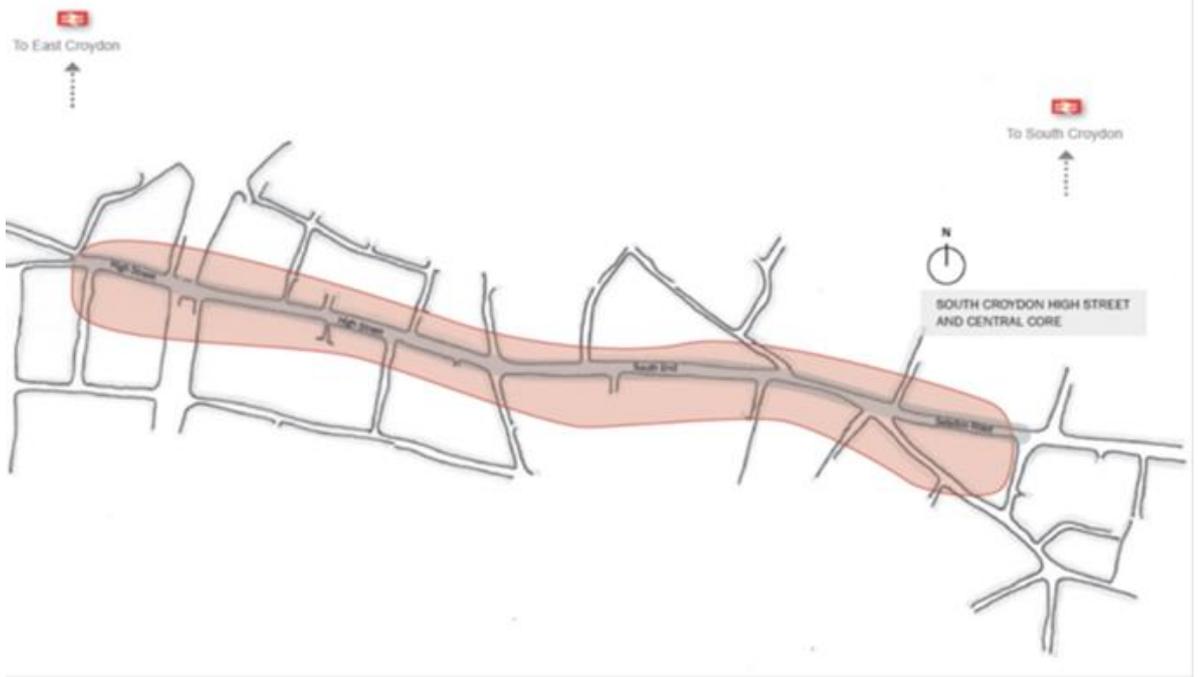
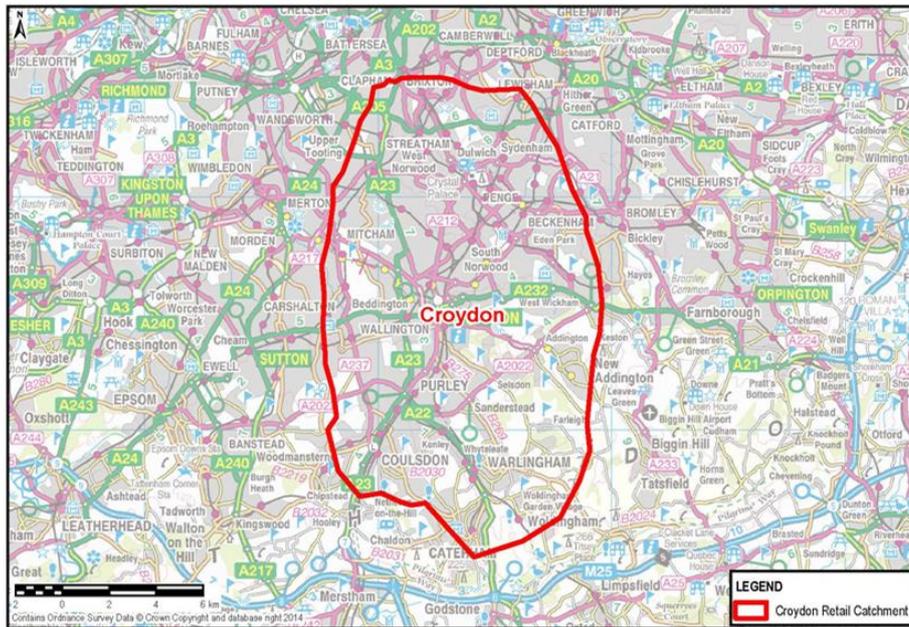


Figure 8.11 Croydon Retail Catchment Map



Context

Croydon is one of London's Metropolitan Centres, with a large commercial, retail and civic function. The town centre is currently undergoing major regeneration, and other areas of the centre, including London Road, Central Area and Old Town, have already been the subject of improvements in an attempt to create distinct quarters with a clear offer. Hammerson and Westfield have recently entered a partnership to help transform the Whitgift and Centrale shopping centres, which has been facilitated by Croydon Council.

The core retail area competes with the nearby out-of-town retail park at Purley Way, and other centres with a similar offer at Bromley, Sutton, Kingston and London's West End. Bluewater is also seen as a competitor.

Croydon has experienced decline over the last 30 years due to a decrease in demand for office space, and the success of landmark office locations such as Canary Wharf. At the same time, investment in the public realm has been limited.

More recently Purley Way, a nearby out-of-town centre, has thrived while the town centre has struggled. Although it is possible for out-of-town and town-centre offers to coexist and complement each other, Purley Way has begun to introduce town centre-type uses which are in direct competition with Croydon town centre. Added to the wider changes such as the rise in internet shopping, Croydon is generally seen as under-performing, and the Council recognises that improvements need to be made to ensure this situation does not worsen.

The introduction of the Hammerson/Westfield development, although perceived as an exciting and positive development, will increase rents across the town centre. This could result in a significant loss of local independent businesses. Incumbent retailers will also face challenges during the redevelopment work with decanting and relocation, and there is a real risk that economic value will be destroyed in this process as businesses relocate outside Croydon.

The Council faces the challenge of protecting independent strips, especially those towards West Croydon station and London Road, which are struggling; this area is receiving investment to improve the public realm. Betting shops and fast food vendors are becoming more prevalent, which presents an additional challenge. There are perceived issues with safety and security in the town centre, including anti-social behaviour.

Parking is perceived to be an issue for retailers and businesses. The privately owned car parks have high tariffs and are of low quality. Westfield/Hammerson

will provide an additional 3,500 spaces which will go some way towards improving this provision. There is also perceived to be a lack of coach parking; this is necessary if new hotels in the town are to cater adequately to the needs of tourists using Croydon as a base when visiting London.

There is a general perception that the planning process is very slow and that it takes time to bring about change. Conservation orders within Old Town make it difficult to implement physical changes.

Policy Framework

Croydon is well advanced in putting in place its Local Plan. The Local Plan Strategic Policies was adopted in April 2013, It includes policies aimed to ensure flexibility to accommodate change²¹ by:

- reclassifying local and district centres (note: not Croydon Town Centre)
- reviewing boundaries
- designating new centres where population is growing.

It encourages non-retail uses in Croydon town centre and other centres in the Borough, including all B1 uses, retail, leisure, hotels, housing and community facilities.

It directs development to Croydon Town Centre, but adopts a flexible approach to uses supplemented by the Opportunity Area Framework and the various Council masterplans. It encourages an increase in retail stock and an improvement in quality to reduce vacancy, and promotes and supports the development of new office floor space.

The supporting text demonstrates that the Council recognises the potential need to provide additional town centres, or to consolidate town centres due to changes in retailing (online shopping, out of town retail). There is also a recognition that Croydon faces competition for inward investment from Thames Gateway, the M4 corridor (Western Wedge), and from centres in Surrey and West Sussex. The policy aims to address this by improving the stock of commercial premises and using urban design and improved local character to help Croydon retain/attract new job opportunities.

The local plan detailed policy will consider the case for a 'small shops/affordable retail' policy to help Croydon retain and develop an

²¹ Policy SP3.7

independent retail sector. It will also consider detailed policy matters such as designating 'Main' and 'Secondary Retail Frontages'.

The Local Plan Detailed Policies and Proposals (Preferred and Alternative Options), October 2013 contains policies to keep A1 uses in the primary retail area, but also to accommodate the expansion of community uses and take account of a small reduction in A1 floorspace (to allow for other uses) due to changes in consumer shopping habits such as online shopping.

The policies restrict the loss of ground floor Class A uses within Main Retail Frontages and Secondary Retail Frontages (unless it relates to the expansion of an existing community use).

Sitting alongside the recent changes to Permitted Development Rights which allow the conversion of offices to residential use for a trial period up to 30th May 2016, the document contains policies to ensure that ground floor units can be converted either to residential or to the same use as the remainder of the building if left unoccupied.

The document proposes policies to protect the restaurant quarter, by restricting change of use, and proposes that out-of-town and edge-of-town development accord with specific criteria.

Policies that encourage residential development in the retail core are proposed. Conversions above retail are welcomed as assisting the regeneration and sense of community and social cohesion of the Croydon Metropolitan Centre, District and Local Centres.

A key document underpinning the Local Plan and guiding redevelopment and regeneration of the Croydon Opportunity Area (designated in the London Plan) is the Croydon Opportunity Area Planning Framework (OAPF), January 2013. As a joint framework between GLA, TfL and London Borough of Croydon it has a strategic focus that sets Croydon in the context of the wider London economy.

The plan aims to:

- Support the introduction of a new residential population in Town Centre
- Consolidate retail in the Retail Core area
- Improve the qualitative offer to meet requirements of retailers and aspirations of shoppers

- Support new retail development, including a new department store
- Support physical improvements to enhance and enliven the core area
- Promote the conversion and redevelopment of surplus office buildings to other uses
- Encourage new cultural and creative industries through a new Enterprise and Innovation centre in the Opportunity Area.

The OAPF recognises that Croydon's retail offer is tired and does not live up to its potential. It claims a current catchment area of the whole of the borough and extending to Warlingham and Caterham in the south and Streatham in the north, but aims to support the development of the town as a retail destination for south London and the wider south-east of England.

The plans for the town are large-scale and holistic including demolition, rebuilding and renewal of large sections of the retail core. This will involve qualitative change and potentially additional retail floorspace including larger units and a new department store.

The OAPF plans for the retail core to become a mixed-use, retail-led destination with new homes, leisure and other work space forming an integral part of the area's make-up. The new development would seek to deliver approximately 1,100 homes in the retail core, leisure and 'complementary' work space, as well as physical improvements to the public realm. It is emphasised that the various shopping centres (including Whitgift and Centrale) are 'mutually complementary'.

The OAPF supports temporary 'meanwhile' uses, which it recognises as important 'in the function and life of the high streets'. The OAPF states that temporary use of vacant shops will be encouraged 'in order to maintain economic activity and interest until more permanent retailing can be established'.

There is no direct mention of how recent trends and changes in retailing will be addressed, rather there appears to be an assumption that the physical changes will drive regeneration and attract inward investment. The plan does not address the issue of competition from out of town retail parks like Valley Park (which will potentially become a town centre in its own right).

The OAPF supports a more flexible approach to change of use and supports the central government policy of allowing conversion of office space into other uses, including retail.

Other key documents relevant to the future of the core area, includes Croydon Economic Development Plan 2013-2018, 2013 which presents the proposed interventions and commitments which represent the first phase for achieving the borough's 2040 vision.

The plan identifies the infrastructure improvements and investments, business growth, support for people and the metropolitan/district centre investments, including

- Begin to create an improved town centre mix
- Deliver a pro-active inward investment service
- Retain existing businesses and grow the business base
- Positive promotion of Croydon; and
- Improving the employability of Croydon's residents.

Actions to deliver the priority of 'begin to create an improved town centre mix' include:

- Delivering comprehensive development of the retail realm to ensure a mixed economy
- Encourage a diverse mixture of office, leisure, retail and residential uses to create a stronger offer while developing a safe and attractive night time economy
- Ensure that business accommodation reflects the flexible office and B1 use class to provide the right environment for emerging sectoral clusters

The plan acknowledges its membership in the Coast to Capital LEP but states it will also support the work of the London Enterprise Panel LEP.

It recognises the impact that perceptions have on the performance of Croydon's economy – aims to tackle it over time through improving the district/metropolitan centre, retail offer and business environment/inward investment.

The plan identifies the Purley Way development and its potential to as a substantial employment zone for the distribution and retail sector. The plan sees this development as a benefit – the borough can offer both town centre and out of centre locations for inward investors. The plan states that the two should be complimentary to Croydon's overall business base; the potential

negative impacts of out of town shopping centres on town centres are not acknowledged.

Response to Challenges

Croydon's town centre faces a number of issues. It is significantly underperforming, given its transport links, large population and large retail floorspace. There has been a downward trajectory for three decades, there is competition from out-of-town retail at Purley Way, the public realm is poor and the town centre has a poor reputation and negative perceptions.

Croydon has suffered minimal effects from the recession (see **Figure 5.10**), with redevelopment being the primary cause of current high vacancy rates, although it has lost a few large chain retailers in recent years. It is perceived to have a good mix in terms of town centre land uses. The lack of definitive boundaries to the town centre encourages and promotes the good use of creative and independent uses; this is happening organically rather than through policy. Around a thousand units have made unplanned conversions from office to residential uses.

The focus of the Council's current policy is on large-scale physical transformation of the town centre, in particular with the introduction of the Westfield/Hammerson retail scheme and the new development adjacent to East Croydon station. Croydon is investing over £50m in public realm infrastructure over the next 3 years. The Grimsey review hailed Croydon's efforts as a good example of civic leadership and public-private sector partnership.

The design of the scheme, which will integrate with the existing urban fabric, is expected to increase footfall through the whole town centre, rather than simply attracting single use trips. However, the significant increase in the supply of retail floorspace means that the Council will consider a contraction in the size of the town centre frontages

There are also plans to improve the public realm, pedestrian connections, a more collaborative retail offer between the town centre and out of town retail at Purley Way and bringing a new residential population into the town centre.

Croydon has seen a large reduction in its demand for office space, as a result of a decrease in demand for 'back office' space and also competition from other London locations such as Canary Wharf. Office workers are an important driver of daytime footfall, however, a combined policy approach of promoting the conversion and redevelopment of offices to other uses (including residential), and improving the stock of commercial premises, Croydon hopes to redefine its commercial and cultural identity and encourage more localised

footfall through the town over the course of a day, rather than the perception of the town as a location for shoppers and workers to visit over a short period, leaving at the end of the day.

In terms of collaboration with other areas, partnership working within Croydon is strong between various agencies, e.g. the Council, BID, chamber of commerce, and business groups. The prevailing opinion is that the Council is supportive and proactive in terms of a partnership approach, although the fact that other centres are often seen as competition is likely to be limiting the extent of collaboration.

Initiatives introduced by the Council include offering up to 100% rate relief for new and growing businesses for over a year or more, 50% rate relief for retail in particular areas (with restrictions on certain categories such as payday loan shops), interest free loans for SMEs. The 'Connected Croydon' scheme aims to improve the public realm.

There has been a concerted effort to ensure vacancy rates stay low, but a lack of control over the type of shops that take up space means that betting shops and pound shops have proliferated. The Council has also introduced a Meanwhile Toolkit, which is running a competition for ideas on how to occupy currently vacant space.

Croydon was one of the Portas Pilot towns which received government funding to pay for town centre initiatives. Croydon's bid for the funding was focused on improving areas of the town hit by the 2011 riots which had added to negative perceptions of the town. The money has been spent on plans for regenerating the Old Town market and there are other planned initiatives such as working with landlords in the Old Town to fill empty retail units.

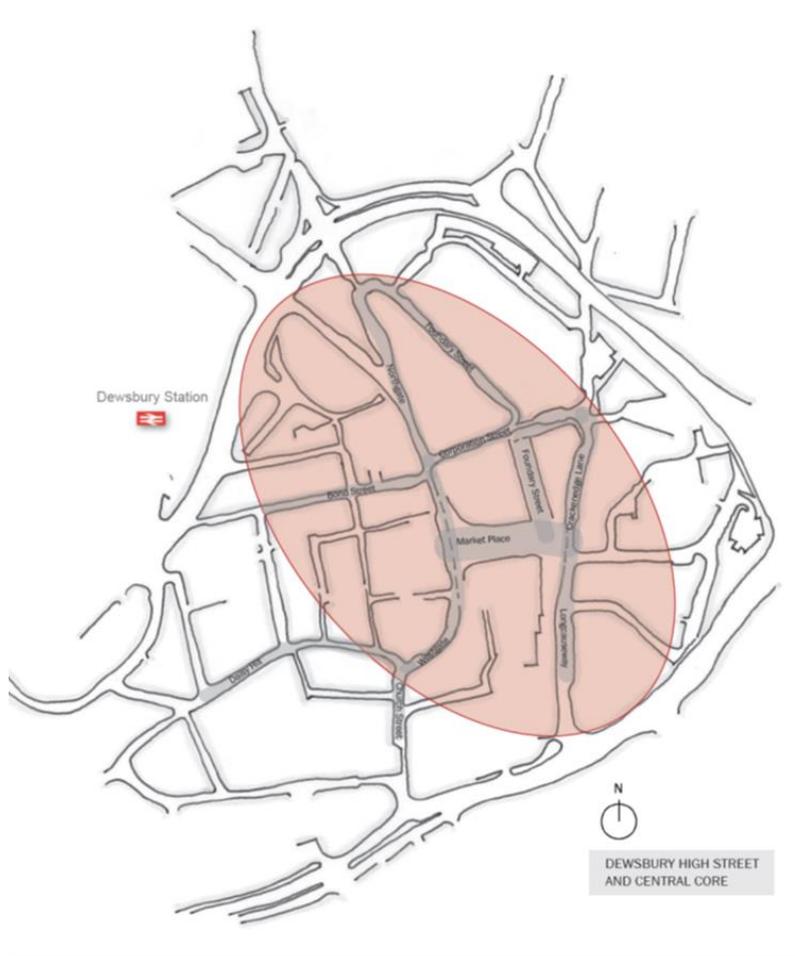
Other projects include the 'Check out Croydon' scheme: a loyalty card for Croydon businesses, a programme of events and festivals, a crime reduction programme, a new market manager, WiFi initiative, a Food Hub with an educational centre, a visitor centre, and other activities associated with the Portas Pilot Scheme including knowledge sharing. Croydon has a town team which is attempting to improve the independent offer and identity of the old town.

Figure 8.12 Croydon retail areas: North End (left) and Croydon Old Town (right)



Dewsbury

Figure 8.13 Dewsbury Town Centre



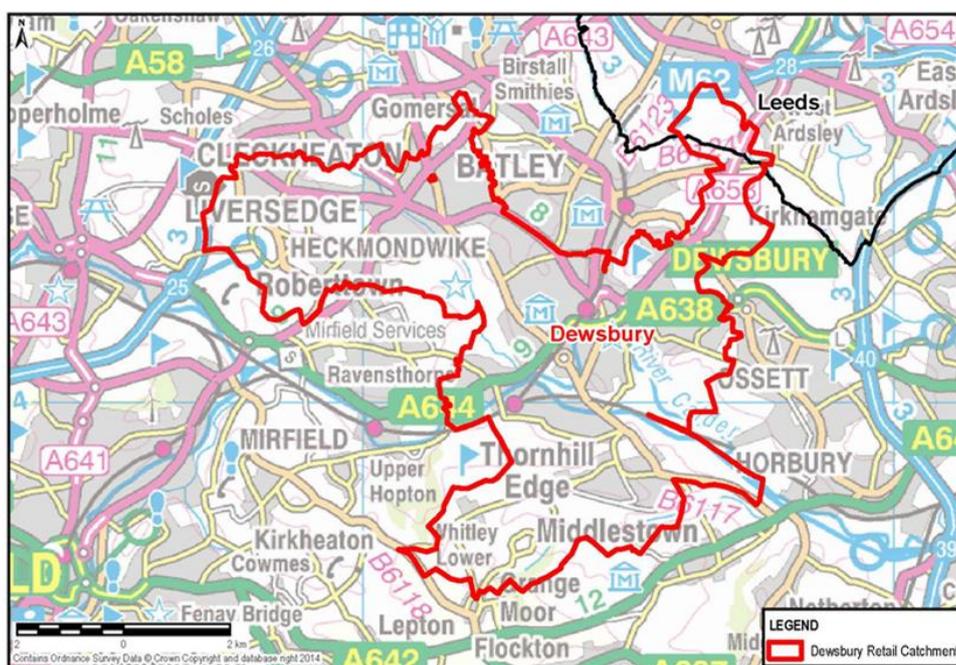
Context

Dewsbury is located within Kirklees Metropolitan Borough in West Yorkshire. It is less than ten miles away from the cities of Leeds and Bradford and the large urban areas of Huddersfield and Wakefield. Dewsbury experienced rapid growth in the 19th century as a mill town and its reliance upon an industry that has now significantly declined provides a challenging economic context for the town centre. Today, Dewsbury has approximately 58,300 residents, almost

half of which live in areas within the 10% most deprived neighbourhoods nationally²², and its economy is reliant upon low value-added sectors.

Dewsbury town centre is contained within a tightly defined inner ring road. The main retail area includes a pedestrianised zone boarded by Longcauseway and Crackenedge Lane, Corporation Street and Northgate. The Prince of Wales precinct – running between Longcauseway and Church Street - also provides a small dedicated retail area and includes outlets such as Boots, Poundland, and a number of mobile phone retailers. The area and streets between the pedestrianised zone and Dewsbury rail station provide a mix of uses with additional retail space being available particularly on Daisy Hill. However, these areas are characterised by lower levels of footfall and a significant number of vacant premises. Dewsbury has a large central market, located on a dedicated site adjacent to Foundry Street. The market is an important driver of town centre activity, with market days typically seeing a 60% increase in footfall compared to non-market days²³.

Figure 8.14 Dewsbury Retail Catchment Area



Dewsbury town centre has experienced difficult trading conditions in recent years with vacancy rates (in terms of the number of units) estimated to stand

²² Source: West Yorkshire Observatory. Figures based upon the Dewsbury Area Committee, estimated using 2012 ONS Mid-year population estimates.

²³ Source: Dewsbury town centre pedestrian footfall 2012. Kirklees Council.

at 26.9% in February 2013²⁴. The retail and town centre offer reflect this and is characterised by a noticeable concentration of lower-value retailers and a lack of multiples within the town centre, a trend that has been compounded by the closure of M&S and McDonalds within recent years. The town centre faces competition from the Rishworth Centre, which is located on the opposite side of the ring road. However, this does provide free parking within walking distance to the town centre.

Leeds is Dewsbury's main competitor; the two retail centres are just ten miles apart. Significant commuter flows to Leeds, combined with its much larger and more diverse retail offer, means that Dewsbury town centre cannot currently compete. Dewsbury also faces competition from the out-of-town White Rose shopping centre, located just 6 miles away and offering over 100 shops, late-night opening throughout the week, free parking and excellent road transport links. These twin challenges make it more difficult for Dewsbury to attract high street retailers to the town, further reducing footfall. The weak local economic context compounds the challenge; Dewsbury would find it extremely difficult to position itself as a high-end, niche destination given the relatively low incomes of the immediate population.

Policy Framework

The emerging **Kirklees LDF Core Strategy**²⁵ has an objective to put the region's town centres at the heart of the economy by encouraging development of offices, shopping and leisure facilities.

However, the delay in adoption of the Core Strategy (until 2017) means the **Kirklees Unitary Development Plan**, adopted in 1999, still guides planning policy. This is now significantly out of date.

The Dewsbury Strategic Development Framework, 2010 was commissioned by Yorkshire Forward and Kirklees Council to provide a 'new generation strategy' for a sustainable future.

The three 'Big Moves' proposed for the town centre are: to create distinctive town quarters; to develop a new high street on Long Causeway; and to reconnect the centre. A number of shorter-term 'stepping stones' are also proposed such as developing a business incubator, enhancing the evening economy, and re-using empty shop space or using town centre spaces creatively to attract footfall.

²⁴ Source: Retail Capacity Study for Kirklees District, February 2014. WYG Planning

²⁵ Approved by Council in April 2013 but has since been withdrawn in response to concerns from the Planning Inspectorate regarding the strategy's fit with national planning policy. A new local plan is being drawn up and is expected to be adopted in 2017.

Conclusions

Dewsbury Town centre has been the focus of significant attention in terms of identifying and adopting ways of revitalising the town centre. Kirklees Council has put considerable effort into Dewsbury town centre through a regular events programme designed to increase footfall, the recently introduced Business Rate Relief scheme, and by securing Heritage Lottery Funding to regenerate a key site within the town centre. However, a lack of financial resources is limiting the local authority's ability to implement some of the planned improvements.

The withdrawal of the Kirklees Core Strategy and the long lead-in time associated with developing a new Local Plan means the planning system has been unable to respond to the challenges facing the centre. National policy factors, such as business rates and the criteria for rate relief, are seen as unhelpful by stakeholders.

Response to Challenges

Stakeholders believed that perceptions of Dewsbury town centre and business confidence within it are both very low. This has been exacerbated by prominent multiples such as McDonalds and M&S pulling out of the town centre. The closure of M&S, which subsequently opened a store in the nearby out of town White Rose Shopping Centre, was particularly damaging, affecting perceptions of the town centre's ability to sustain the flagship multiple retailers typically associated with a thriving town centre.

The retail offer within the town centre is considered to have declined significantly in recent years to a point where the current format and function of the town centre is widely considered to be unviable. This was reinforced by a recent Retail Capacity Study commissioned by Kirklees Council²⁶, which concluded that demand for retail space can now be expected to be permanently lower than current supply.

The withdrawal of the Core Strategy has left a policy vacuum. Local planning policy is currently still based upon policies adopted within the Unitary Development Plan that were developed and adopted in significantly different economic and trading circumstances. The long lead-in time likely to be associated with developing and adopting a new Local Plan means this situation will remain unchanged for several more years.

²⁶ Source: Retail Capacity Study for Kirklees District, February 2014. WYG Planning

The lack of planning policy mechanisms to actively change the town centre means the major focus of town centre regeneration is upon the redevelopment of Pioneer House. Kirklees Council has secured £2m of Heritage Lottery Funding to regenerate the currently derelict property at the north-west corner of the town centre. The development will combine office, business and residential accommodation, and is a move to diversify away from retail.

The lack of resources available to fund change within the town centre is having an impact on several fronts. The area's Town Team is currently run on a voluntary basis and so has limited capacity to organise and deliver initiatives that could help attract footfall to the town centre. To work within these constraints, the council is shifting its focus towards encouraging local businesses, interest groups, and associations to take ownership of the town centre themselves. In this vein, a 'Co-Create' workshop is developing a new brand for Dewsbury Town Centre to help raise its profile and change external perceptions.

Kirklees Council has in the past spent money on one-off events; in the summer of 2010 for example, it provided a temporary badminton court, supported the opening of pop-up shops and a candlelit fish and chip supper in the market. However, there is local scepticism that such measures have long-term benefits for permanent retailers, and the lack of available funds means the need to demonstrate a tangible benefit is greater than ever. Despite this, Kirklees Council has recently approved a £60,000 upgrade of Dewsbury's Market Square to provide a 'decluttered' space that is more suitable for holding town centre events.

Business rates are seen as being too high given trading conditions. A £20,000 Business Rate Relief scheme targeted at new shops opening within Dewsbury town centre has recently been announced. It is small-scale, and unlikely to be extended or enlarged for the budgetary reasons described above. Decentralisation of this and other powers is seen as key to regenerating the town.

Business rate exemptions on empty listed buildings were cited as being just as damaging for a centre as high rates on occupied buildings, as they remove the imperative for landlords to find occupiers for empty retail space. The local authority has limited powers to intervene and return an empty site to active use in such circumstances.

Landlords have also been found to place businesses teetering on the brink of administration in their empty units, meaning that although the sites aren't empty for long, nor are they contributing to the long-term prospects of the centre. This is a good example of a market failure; the decisions of individual

landlords have a wider societal impact that is not 'priced in' to their financial decisions.

Figure 8.15 Dewsbury Town Centre



Type 2 Centres: Medium-sized to large, diverse, struggling

This typology has a medium-sized catchment, with a greater emphasis on convenience goods than the largest centres tend to have. The offer tends to be diverse, with non-retail spending a larger proportion of total spend than is the case in larger centres.

Examples of good practice from town centres of this type have focused, like the larger centres, on physical regeneration of key sites, but also encouraging non-retail uses, encouraging flexibility in change of use, and encouraging the use of vacant units for temporary and community uses.

In terms of the impact of retail trends on Type 2 centres, the use of online shopping is likely to be highest in areas with a strong socio-economic context, meaning Type 2 centres are potentially less vulnerable in the near-term. However, this won't be the case forever, and as the technology proliferates, secondary and tertiary centres will lose what retail-driven footfall remains to 'destination' centres, forcing their offer increasingly towards convenience goods and services.

Type 2 centres can combat this trend by giving people a reason to visit, partly through encouraging more diverse town centre uses so that towns become workplaces and meeting places as well as shopping centres, and partly by making the centre a desirable place to visit and spend time.

Figure 8.16 Coast to Capital LEP Area Spatial Interaction

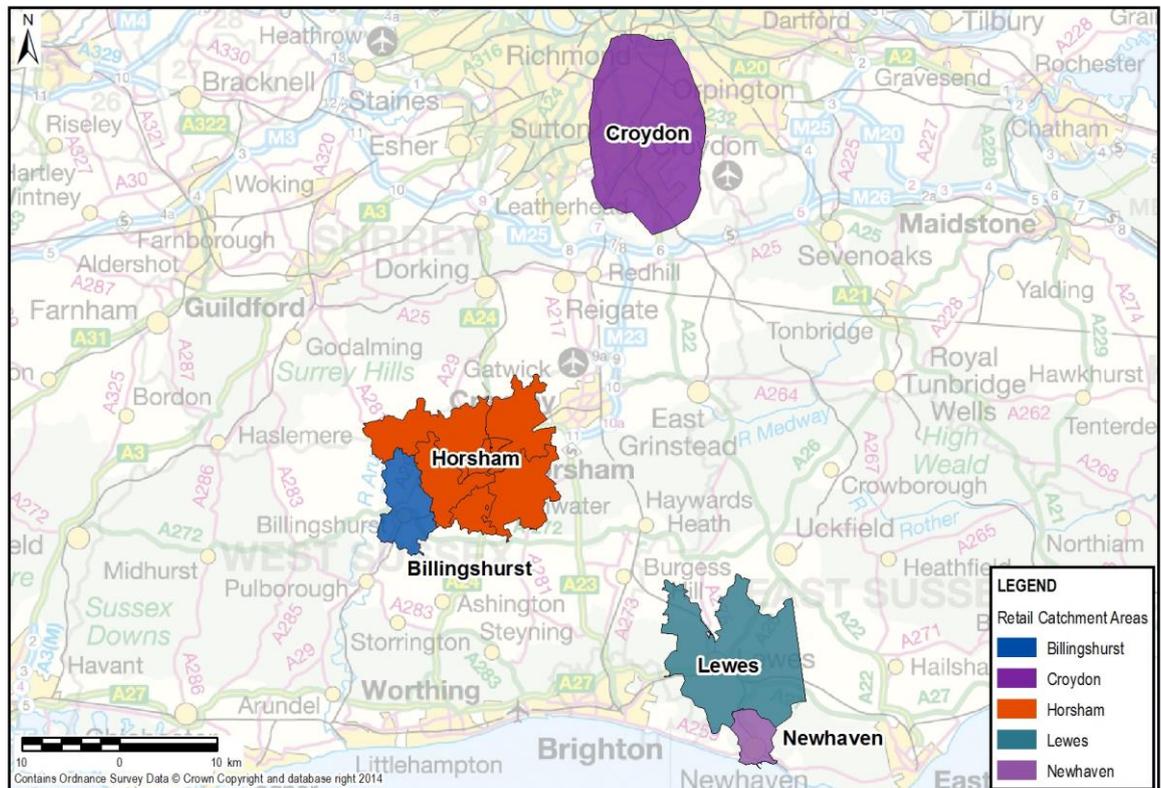


Figure 8.16 shows the retail catchments of the case study towns in the Coast to Capital LEP. Although Croydon is a London Metropolitan Centre with good transport links to London, its catchment does not reach far beyond the Greater London boundaries. To address this under-performance Croydon is designated as an Opportunity Area in the regional spatial strategy, the London Plan.

The other Type 2 case study, Dewsbury in the Leeds City Region, caters for a more local market (see **Figure 8.7**). It is under-performing relative to the large centres Leeds and Harrogate, and the niche markets of towns like Hebden Bridge. While neighbouring cities and towns are benefiting from Leeds' success, Dewsbury is largely missing out on the spillover due to its industrial legacy, socio-economic context and the damaging effects of out-of-town retail.

Figure 8.17 Type 2 Towns: Recommendations

Policy
<p><i>National</i></p> <ul style="list-style-type: none"> • Encourage partnership working between local practitioners, to ensure policy decisions are beneficial to all town centres in an economic region. This is particularly important for ‘secondary’ towns facing competition from more successful neighbours
<p><i>Local</i></p> <ul style="list-style-type: none"> • Promote an increase in leisure and cultural uses, including the evening and night time economy, to better compete with out-of-town centres • Consolidate retail within the town centre and allow flexible change of use in non-core areas • Make selective use of Compulsory Purchase Orders where appropriate to bring together successful sites and provide premises that are commercially attractive to operators • Use new and enhanced financial models such as prudential borrowing, rates retention, revolving infrastructure funds and partnerships to leverage funding into high streets. • Produce development strategies to provide positive frameworks to proactively guide development • Promote large-scale, well-designed, street-based retail and leisure schemes • Minimise vacant units’ impact on high street vitality by encouraging temporary uses • Organise and promote one-off or regular events, such as markets • Encourage the conversion of surplus office space to residential and improve the existing stock of office space to encourage localised footfall throughout the day. Ensure enough traditional town centre uses remain to provide essential local services and support town’s aspirations.

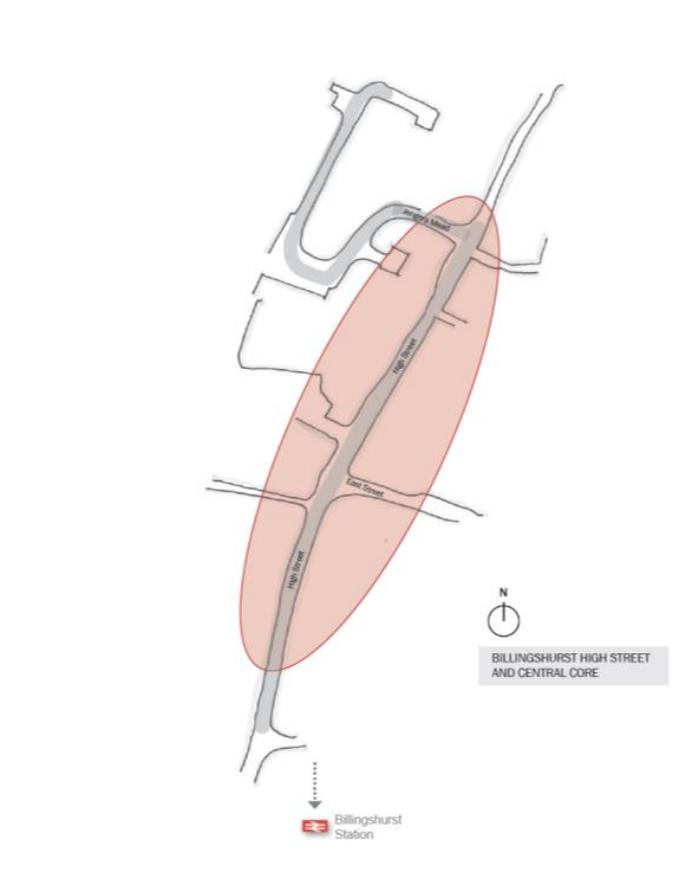
<ul style="list-style-type: none"> • Ensure the retail units that are available meet modern standards • Promote the use of digital technology, e.g. using libraries or post offices as digital hubs
<p>Examples of good practice</p>
<ul style="list-style-type: none"> • The strategic level of planning that operates in London within the remit of the GLA ensures the spatial relationship between towns within Greater London, e.g Croydon, are taken into account and policy decisions are made according to the strengths and opportunities of town centres within each Borough in relation to neighbouring town centres • Croydon has a strong and proactive BID, good joint working between policy makers and practitioners, strong leadership and an effective approach to public-private partnership • Initiatives such as the independent retail initiative, Check out Croydon etc, a new innovation and enterprise centre to encourage creative industries, introducing rate relief schemes, interest-free loans for SMEs • Dewsbury has a dedicated market day which increases footfall in the town centre by 60%
<p>Other initiatives to consider</p>
<ul style="list-style-type: none"> • Promote the use of 'click and collect' points within the town centre to encourage footfall • Give business rate relief to businesses willing to occupy vacant units • Encourage temporary uses of vacant units • Promote strong and effective BIDs and town centre management • Encourage loyalty initiatives such as a local 'currency' • Invest in place branding and marketing
<p><i>National: Central Government (DCLG, BIS, HM Treasury)</i></p> <p><i>Local: Local Planning Authorities, LEPs, BIDS, town teams, town centre</i></p>

partnerships/managers, chambers of commerce, neighbourhood planning groups

8.4 Type 3 Centres: Small-medium, weak socio-economic context, struggling

Billingshurst

Figure 8.18 Billingshurst Town Centre



Context

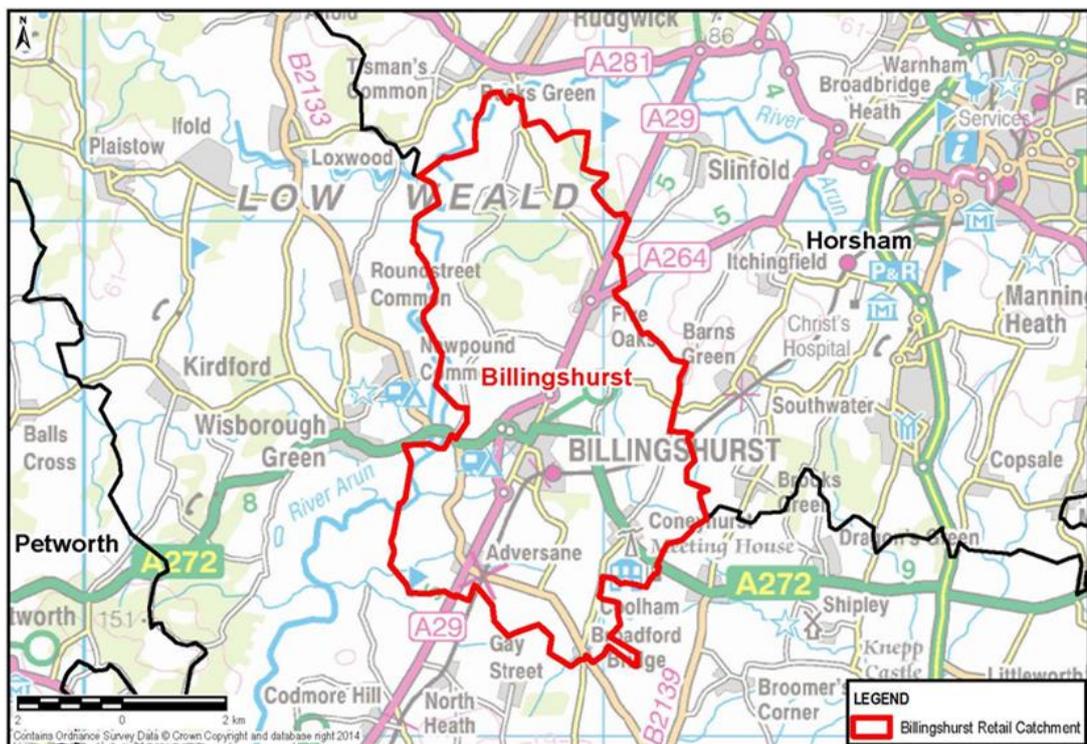
Billingshurst is in Horsham District in Sussex, approximately six miles south-west of Horsham town centre and has a predominantly independent retail offer along a linear traditional high street. The town has a fairly diverse range of shops, however the non-retail offer is limited to a small number of offices,

pubs, takeaways and restaurants. The village centre has one medium-sized supermarket (Budgens) located on the high street and there are currently two large supermarkets located within nearby Pullborough and Horsham.

In 2006, £400,000 of public realm improvements were made to Billingshurst High Street, paid for through developer contributions. The improvements provided a more pedestrian-friendly experience to accommodate shoppers and improved the overall quality of the environment. The high street has some attractive frontages, with a variety of shop sizes and a number of listed buildings which add character.

In recent years the number of takeaways and estate agents has continued to grow and occupy retail properties, with implications for the strength of the retail offer.

Figure 8.19 Billingshurst Retail Catchment Map



Billingshurst serves a predominantly local market and the retail offer is limited in its diversity and scale. The two major supermarkets close to the village draw shoppers away from the high street, meaning the village struggles to attract

footfall. The opening of western bypass has reduced traffic, but has also directed passing trade out of the centre of the village.

In addition the primary car park within Billingshurst was purchased in 2008 and turned into a charging car park. This has once again had a negative impact on the attraction of the village centre for local shoppers.

Policy

The **2013 Horsham Planning Framework Preferred Strategy** adopts a 'Town Centres first' approach to development within the District and recognises the importance of maintaining the vitality and viability of town centre uses. It supports the increased diversity of town centres outside of the provision of retail uses to include leisure, entertainment, sports and recreation, arts, culture, business and commercial uses. There is a recognition that this diversity will be essential in addressing significant changes and uncertainties in the economic prospects facing town centres. **The Horsham District Council Core Strategy**, adopted in 2007 and still the current planning policy for the district, makes the same point about encouraging a diverse range of uses.

Specific guidance is given for change of use within primary and secondary frontages and directs that outside of town/village centre boundaries town centre uses will not normally be allowed. This is with the exception of Broadbridge Heath which is identified as an Opportunity Area and as such is the only location currently being considered for out-of-town retail development.

The **General Development Control Policies DPD**, adopted in 2007, in many ways contradicts the policy of diversification. Leisure, residential or recreation uses within high street designations are discouraged, and the focus is on retaining retail space for retail use. This could be a reflection of its age; the document pre-dates the financial crisis and subsequent recession.

The **Billingshurst Parish Design Statement** was adopted by Horsham District Council as a Supplementary Planning Document and sits within Horsham District council's LDF. It advocates the retention of the local retail footprint to provide a valuable retail offer within close proximity to homes and supports the high street as the village centre. It restricts conversion of ground floor commercial units into residential and instead promotes bringing vacant space above shops back into use as residential accommodation.

Response to Challenges

Billingshurst was identified by stakeholders as one of the most challenged towns within Horsham District. The most pressing issue was identified as

being land ownership, and in particular a lack of co-ordination between landowners. There are a small number of landowners with large land holdings within the centre of the village which creates a complex pattern of ownership. Consultation with landowners will be key to unlocking the central area for redevelopment, particularly the car park which suffers from poor environmental quality and underuse. A Supplementary Planning Document (SPD) is currently being prepared for Billingshurst; once adopted in July 2014, the SPD will enable the Council to utilise Compulsory Purchase Orders where necessary to enact change.

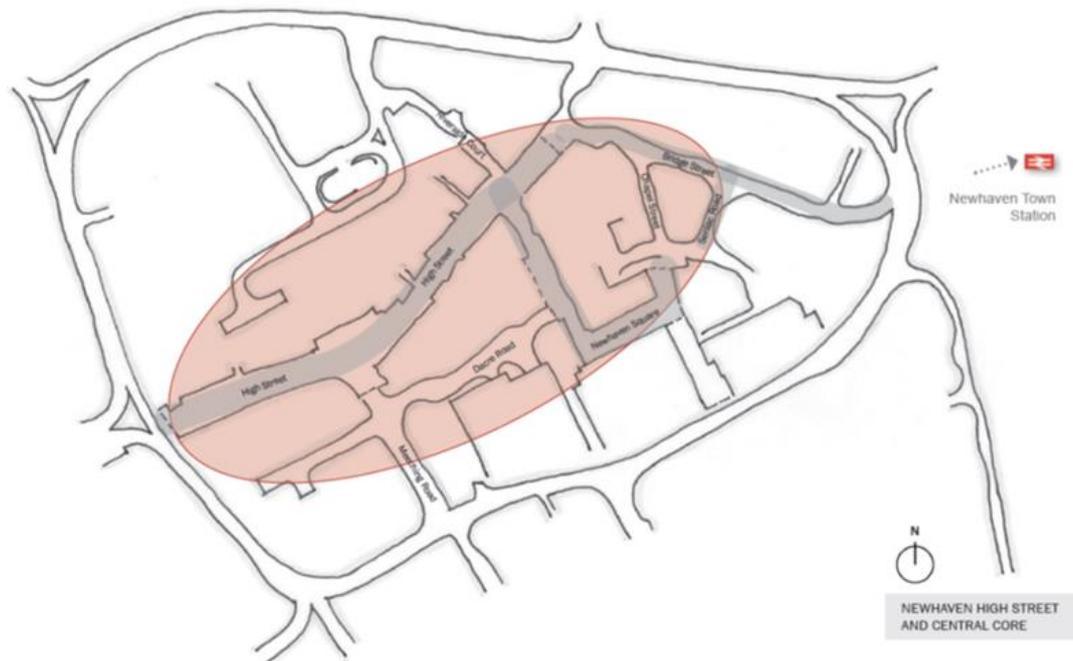
It was noted that the supermarket presence within Billingshurst is one of its biggest challenges as it is not strong enough to attract adequate levels of footfall in its own right. The town does not have a strong evening economy and residents tend to travel to centres such as nearby Horsham or even Crawley for leisure activities. There is an acknowledged need on the part of the Council to attract a greater number of brand retailers to increase footfall and to support the viability of the town centre for inward investment.

Figure 8.20 Billingshurst Town Centre



Newhaven

Figure 8.21 Newhaven Town Centre

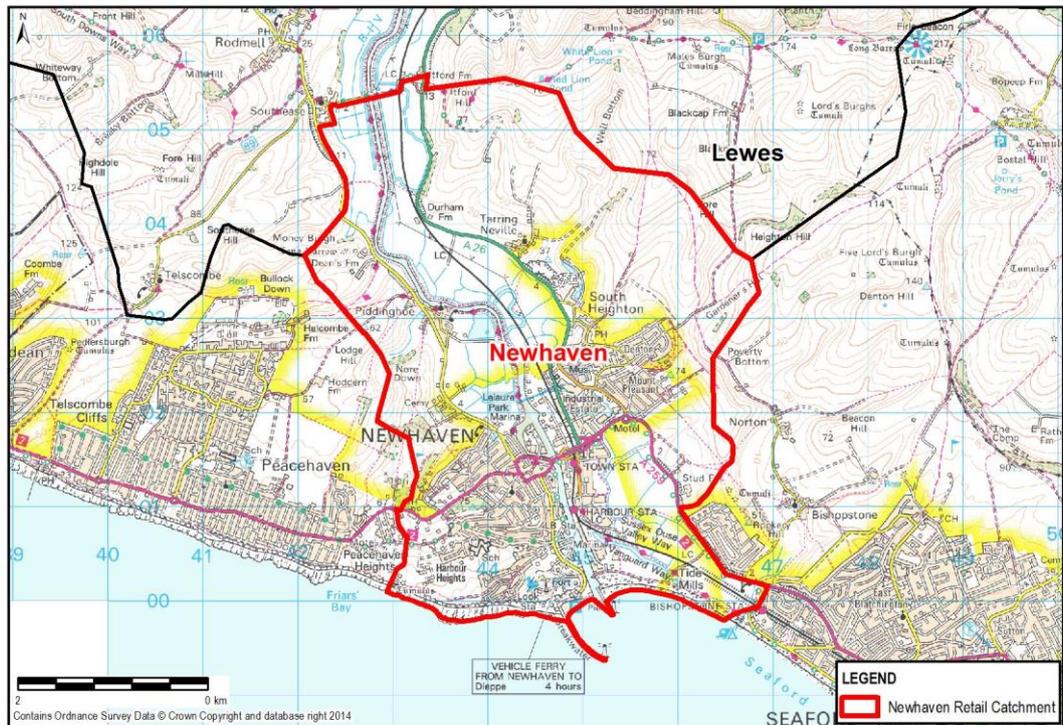


Characteristics

Newhaven is located within the Lewes District which also includes the towns of Lewes, Peacehaven, Seaford and Telscombe/East Saltdean as well as a number of rural villages. Lewes District is relatively affluent as a whole, with Lewes being particularly prosperous and Newhaven less so.

Newhaven struggles to attract footfall, a problem many attribute to the 'concrete collar': the ring road which separates the town centre from the wider area. In recent years nearly all of the large high street retailers have left the centre, to be replaced by short-term retail occupiers such as charity shops or seasonal shops. There is a significant amount of 'edge of centre' retail – including the supermarket Lidl – which attracts a large number of people from the surrounding area, but those visitors rarely make it into the town centre. Subsequently Newhaven town centre has become very much a local centre serving the needs of the local resident population, although even in this respect it is impeded by accessibility issues.

Figure 8.22 Newhaven Retail Catchment Area



Policy Framework

Prepared in partnership with the South Downs National Authority, the **Lewes District Local Plan- Joint Core Strategy- Proposed Submission Document, January 2013**, once adopted, will guide new development and change in the district for the period up to 2030. The plan will supersede the Lewes District Local Plan which was adopted in 2003.

The plan defines Newhaven as a 'local centre', with the strategic objective of the retail policy being to:

- Maintain and enhance the vitality and viability of the district's town centres, retail centres and local centres as hubs for shopping, business, entertainment, cultural and community life.
- Stimulate and maintain a buoyant and balanced local economy through regeneration of the coastal towns, support for the rural

economy and ensuring that the economy is underpinned by a balanced sector profile.

- Work with other agencies to improve the accessibility to key community services and facilities and provide the new and upgraded infrastructure that is required to create and support sustainable communities.

The policy outlines the approach to the promotion and enhancement of the vitality and viability of retail and town centres in the district by supporting development that reinforces or enhances the identified role of the centre in the retail hierarchy.

Newhaven town centre is identified as a centre where a diverse range of retail and other uses such as cafes, restaurants, financial and professional services, employment, arts, cultural and community facilities will be encouraged to support the retail function. The policy also states that vacant retail units within the Newhaven Primary Shopping Area may be used for these uses and changes of use to residential will be supported within the town centre except at street level in the Primary Shopping Area. It supports the retention of local shops and community facilities within local centres unless it can be demonstrated that they are financially or otherwise unviable.

The document identifies a hierarchy of retail centres and has an appropriate policy approach for each area to “allow the type and scale of retail and town centre development proposals to be tested to ensure they are commensurate with the role and function of the relevant centre and the appropriate development types”. The supporting text directly supports a flexible approach for the re-use of redundant or unviable retail units for alternative uses of benefit to the local community which support and maintain the vitality of the local centre or neighbourhood.

In **Building a Brighter Future, A Regeneration Strategy for Lewes District Council 2012 – 2015**, there is a recognition that Newhaven town is suffering from a multitude of different factors such as generational deprivation as a result of the recession, the high remediation costs of existing developable brownfield land and an underdeveloped service sector. In particular it is acknowledged that the town centre struggles to be attractive and viable for businesses, partly due to the age of the building stock.

There are however proposals to bring a renewable energy facility to the town and to encourage links with both Brighton and Suffolk universities to help it become a centre for green industries and innovation. A local Enterprise Zone is also being mooted as a potential mechanism to provide additional incentives

for investment and to deliver support for local business growth. Although not directly related to retail, these measures would help to increase the quantum of economic activity within Newhaven, which would have a knock-on benefit for the high street.

The current Local Plan is *Lewes District Local Plan, March 2003* which is now out of date. It represents a sound set of policies which support a strategy of consolidation and investment in town centres. However, it does not establish a hierarchy of retail centres and as such has less of a strategic focus in directing the appropriate types of development proposals towards appropriate town centre locations. There is also no real focus on change of use applications within town centre locations or a strategy to deal with vacant/redundant units. It supports the development of out of town retail if certain criteria are satisfied.

Response to Challenges

The decline of Newhaven is being tackled through planning policy changes and various other initiatives. In terms of planning policy, the town was downgraded to a local centre (having previously been a district centre), following the 2012 retail study findings. In addition, the council has redefined the primary frontages within Newhaven town centre and is now taking a more permissive stance on the retention of retail uses, supporting and encouraging restaurants and cafes, financial services and community uses at ground level.

To encourage more employment and residential uses within the town centre, the Council's property team is currently looking at the potential of Council-owned sites within the town centre, and some public sector activities may be relocated to the town centre. Other ideas to repopulate the centre include bringing a library into the town, and encouraging students from the new University Technical College (due to open in 2015) to venture across the river into the town centre. A wind farm due to open in the area soon will mean a larger local workforce and therefore increased footfall in the town centre.

To reduce the negative effects of vacant retail space, the Council has encouraged landlords to allow local artists to use vacant units to display their work. The Council has rented itself a vacant unit to use as a consultation hub while they gather feedback on their plans for Newhaven.

In addition, the economic development team has done some work on improving the image of the retail units within the town centre, using funds from the Portas Pilot Scheme to fund a farmers' market²⁷.

²⁷ Newhaven received £10,000 as part of the government grant to the Portas Pilot unsuccessful bidders.

Figure 8.23 Newhaven Town Centre and Edge of Town Retail



Type 3 Centres: Small to medium-sized, weak local economic context, struggling

This type of centre has a below-average catchment for comparison goods, but a larger catchment for convenience goods. The offer tends to be homogeneous, with a relatively large proportion of spending on convenience goods.

The case study areas have shown that these areas sometimes suffer from a lack of policy focus and investment as the greater policy emphasis is given to the larger town centres in the local authority area. Further, there can be a tension between wanting to retain a core of retail uses for the benefit of the local community, and wanting to create a more diverse mix of uses to encourage footfall, and policy documents can send out mixed messages in this regard.

The weak local economic context in which Type 3 centres sit presents an additional challenge for policy makers, as it will necessarily constrain the economic potential of the centre. A small centre needs to cater to local tastes in order to be successful, and convenience goods will therefore need to remain a significant component of the offer.

Neighbourhood Planning could be particularly effective for this type of centre, and plans developed by Billingshurst and Newhaven have been started, although are at an early stage.

Figure 8.24 Type 3 Towns: Recommendations

Policy
<p><i>National</i></p> <ul style="list-style-type: none"> • Coordination of town centre decision making to encourage partnership working between local practitioners, to ensure policy decisions are beneficial to all town centres in an economic region.
<p><i>Local</i></p> <ul style="list-style-type: none"> • Develop local policies that build on the unique character of the area. Smaller town centres can create a niche shopping and leisure experience to complement larger neighbouring towns and out-of-town retail • Encourage markets and other temporary attractions and encourage local food and craft producers to trade in town centres, e.g. through farmers' markets • Promote neighbourhood planning to include high streets where appropriate. This could for example be done by encouraging retailers and town centre owners to be more involved in or even lead on neighbourhood planning. • Consider allowing conversion of retail and other uses to residential in town centre. However, this needs to be balanced against the need to provide essential local services and support aspirations for the town centre. • Provide adequate parking and ensure towns are accessible by public transport • Promote a balance of daytime and night time economy • Promote the use of 'click and collect' points within the town centre to encourage footfall
Examples of good practice
<ul style="list-style-type: none"> • Horsham District Council is producing specific policies to allow site assembly in Billingshurst to encourage regeneration of key town centre

<p>sites.</p> <ul style="list-style-type: none"> • Lewes District Council has redefined Newhaven’s town centre role to reflect loss of trade, and is combining this with efforts to promote non-retail use to increase high street footfall.
<p>Other initiatives to consider</p>
<ul style="list-style-type: none"> • Invest in shop front and public realm improvements • Introduce empty property initiatives e.g. empty shop management orders • Provide help with wayfinding, for example using WiFi • Invest in place branding and marketing • Help small businesses to access finance
<p><i>National: Central Government (DCLG, BIS, HM Treasury)</i></p> <p><i>Local: Local Planning Authorities, LEAs, BIDS, town teams, town centre partnerships/managers, chambers of commerce, neighbourhood planning groups</i></p>

8.5 Type 4 Centres: Small-medium, strong socio-economic context, thriving

(Example: Horsham, Lewes, Wombwell, Hebden Bridge)

Horsham

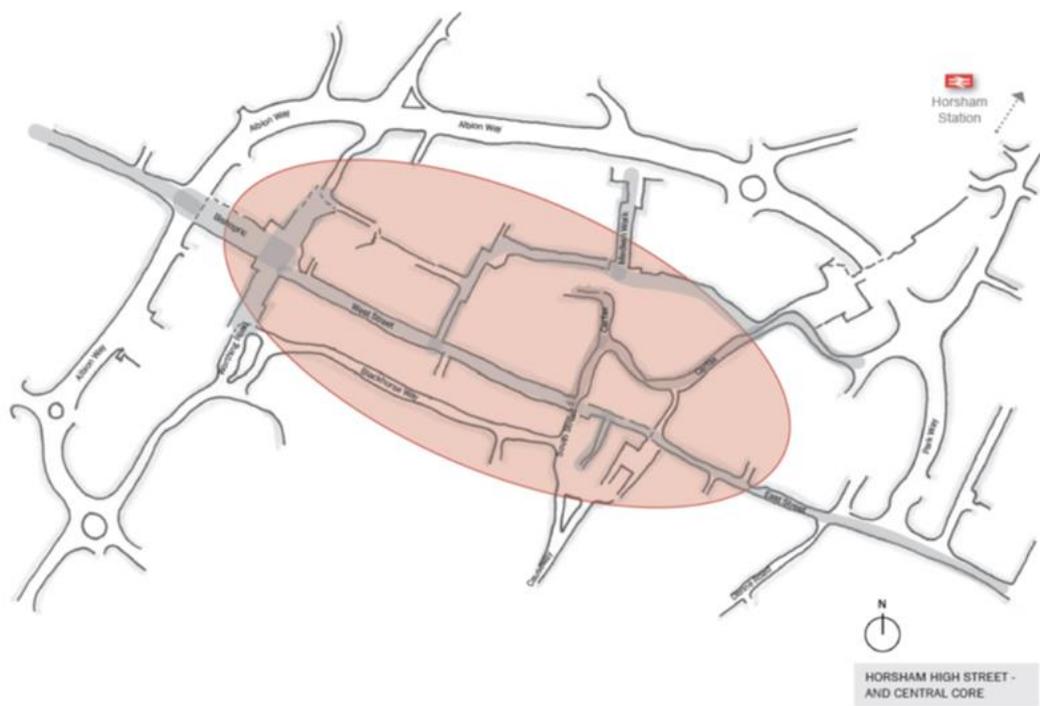


Figure 8.25: Horsham Town Centre

Context

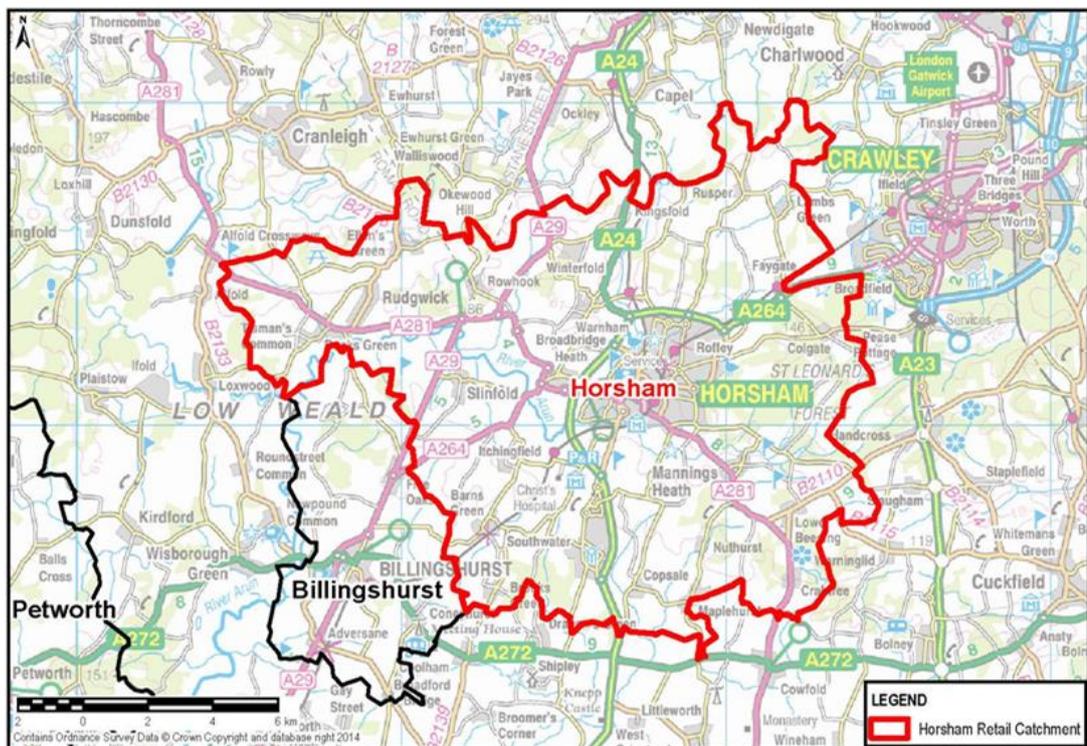
Horsham is an affluent historic market town situated within West Sussex. The town performs a sub-regional centre role, compared to the surrounding villages which support community and convenience functions. The Core Strategy 2007 characterises Horsham town centre as ‘a vital and viable town centre providing a good range of choice of facilities but with scope for continued improvement, particularly in terms of management to minimise the loss of trade to other destinations’.

The town centre offers a good range and mix of independent retailers and chain retail stores, centred around the historic core and including the key areas of Albion Way, the Forum, West Street and Swan Walk. The core of

Horsham town is almost wholly designated as a conservation area which provides a high-quality historic environment to attract both shoppers and visitors.

Recent investment has improved the town centre's public realm. Improvements include the implementation of shared road space and the pedestrianisation of East Street and Market Square. This investment has successfully fostered a café and restaurant quarter focused on East Street and has diversified Horsham's offer, particularly in regards to the evening economy.

Figure 8.26 Horsham Retail Catchment Area



Horsham has weathered the recession well and has managed to keep vacancy rates relatively low throughout. However, a reduction in demand for office space has had a knock-on effect to passing trade within the town centre. Its proximity to Crawley, Guildford and Worthing means that it must continue to attract further investment in order to remain competitive. The town has recently secured a new John Lewis/Waitrose development on the fringe of the town centre which it hopes will leverage further investment from chain retailers looking to capitalise on the 'John Lewis' effect. The development is seen as a game changer in comparison to the retail offer of competing centres and is seen a significant opportunity to increase footfall to the town.

Policy Framework

The **2013 Horsham Planning Framework Preferred Strategy** document is a review of the previously adopted Core Strategy and General Development Control policies, based on a recent updated evidence base.

The strategy document goes further than previously-adopted policy documents in addressing the recent challenges surrounding town centres. It supports the increased diversity of town centres outside of the provision of retail uses to include leisure, entertainment, sports and recreation, arts, culture, business and commercial uses so that town and village centres continue to remain relevant in their provision of functions and services for community life. Draft Policy 4 identifies Horsham town as a 'gateway to the District' and outlines its role as a centre of influence for smaller towns and villages in the surrounding hinterland.

The Planning Framework adopts a 'town centres first' approach to development within the District and again recognises the importance of maintaining the vitality and viability of town centre uses. The policy recognises the development hierarchy of the district and identifies Horsham Town as the primary centre.

To support and enhance this hierarchy the policy proposes to improve Horsham town centre as a primary centre whilst encouraging other centres to sustain their role in meeting needs and acting as a focus for a range of activities appropriate to the scale and character of the centre. Specific guidance is given for change of use within primary and secondary frontages and directs that outside of town or village centre boundaries town centre uses will not normally be allowed. The one exception to this is Broadbridge Heath which is identified as an opportunity area and as such is the only location currently being considered for out-of-town retail development.

Specifically focusing on the needs of the town itself, the **2012 Horsham Town Plan SPD** constructs a strategic set of guidelines against which future development within the town centre should be assessed. The vision for Horsham should be to 'continue to be a distinctive destination of choice which is safe, easily accessible and enjoyable to visit'.

The SPD outlines overarching development guidance for the town centre as well as specific guidance for key sites within the town centre that have been identified for regeneration.

In particular, there is a need to introduce a greater mix of size of flexible retail units within key redevelopment opportunity areas to provide more attractive opportunities for modern retailers. Outside of the key redevelopment opportunity areas the existing stock should be maintained and upgraded for continued occupation by smaller and independent retailers within the historic core.

The adopted current planning policy is contained in the **2007 Core Strategy** which is now significantly out of date. The strategy takes a positive but cautious approach in management of the District's town centres and adopts a position of needs monitoring rather than adopting specific development proposals. It is supported by the 2007 Horsham General Development Control Policies DPD which supports the promotion of retail uses within existing retail frontages and adopts a fairly stringent approach to change of use. It directs that a change of use from A1 to other A use classes. This approach is adopted to protect the vitality and viability of the District's town centres. It recognises the danger of residential development and encroachment on retail frontages. The document also outlines that proposals for retail and leisure uses outside of defined centres may be permitted when relevant criteria within PPS6 are met.

As with the Core Strategy, this document was adopted in 2007 before the global economic crisis and thus is not reflective of the trends currently impacting upon the high street and town centres.

Response to Challenges

Horsham differentiates itself from nearby competing centres through its comparison retail offer which includes some high-end retailers alongside a wide range and variety of independent shops. There has also been a significant degree of investment such as the recent £500,000 renovation of East Street which focused on improving the streetscape and improving the environment to make it more pedestrian friendly. This street has now attracted a number of restaurant chains and has anecdotally been rebranded 'Eat Street'. It serves as a hub for the daytime and evening economy and helps keep the town centre busy.

In interviews with stakeholders it was noted that Horsham has weathered the recession particularly well. Evidence provided by the town centre manager indicates that vacancy rates have remained with a range of 5-6%. This is attributed to concerted efforts to promote the town to visitors and locals. In particular, the town centre manager organises a busy events calendar aimed at increasing footfall within the town centre, which has proved very successful in changing the image of Horsham as a destination for visitors. The Council has also instigated a range of initiatives such as using digital technology in its

promotion of the town and is consulting on the possibility of introducing free WiFi into the centre as a mechanism to help visitors find key sites more easily, and to raise awareness of town centre events and promotions. Digital number plate recognition is also being considered to make parking within the town centre easier.

Horsham District Council has also helped to establish Horsham Unlimited, a business partnership which plays a key role in steering investment by the council and attracting contributions for a wide range of initiatives. This has been a factor in the town's continuing success in attracting investment.

The most conclusive finding to emerge from the consultation was that the diversification of Horsham's offer in regards to the experience of the visitor is one of the key factors in its success. This was seen as crucial in counterbalancing the reduction in footfall associated with a falling office workforce, and has meant considering Horsham's offer against those of its main competitors; having an incumbent office population reduces the need to think about the competition.

An important point raised during the consultation was that Horsham has benefitted from three supermarkets within walking distance of the town centre. This helps to generate repeat business for the town; people visit the broader retail offer as part of their food shop. The recent decision of John Lewis/Waitrose to locate in the town is expected to add to this positive spillover effect.

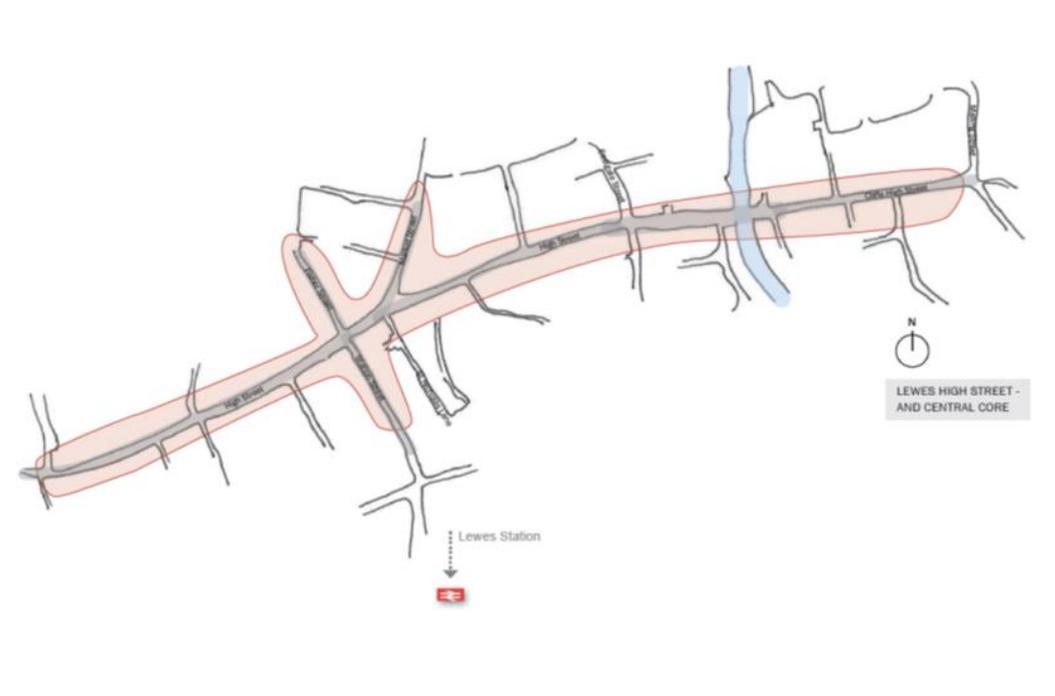
There appears to be a positive approach to collaboration within the council and between stakeholders working towards maintaining and improving the town centre. Horsham is part of the Gatwick Diamond working group at the member and officer level, which aids knowledge sharing. There is also a local strategic statement covering the role of local centres which has been signed up to by local authorities. The town centre manager is involved in the Association of Town and City Management (ATCM) group which is a popular resource that allows best practice to be shared amongst practitioners.

Figure 8.27 Horsham Town Centre



Lewes

Figure 8.28 Lewes Town Centre



Characteristics

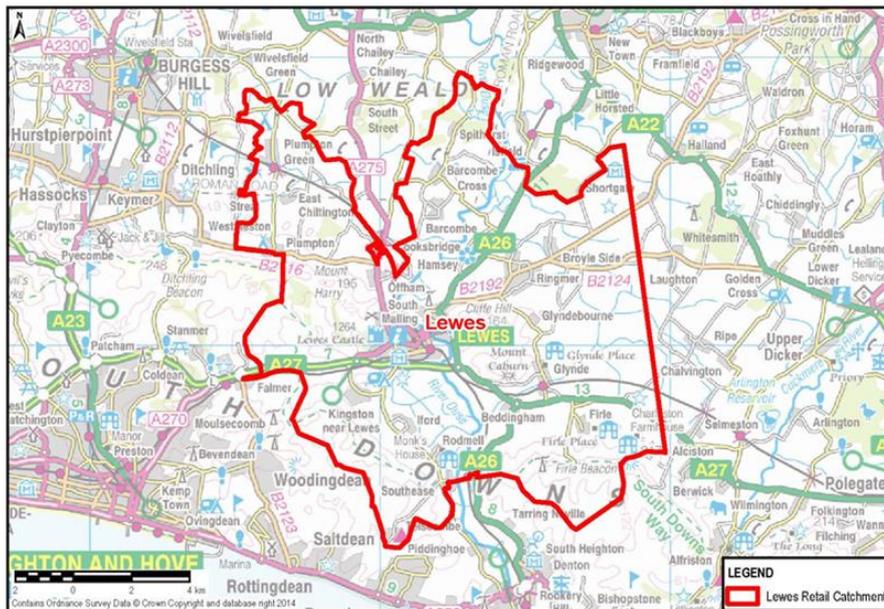
Lewes District includes the towns of Lewes, Newhaven, Peacehaven, Seaford and Telscombe/East Saltdean as well as a number of rural villages. It sits between Brighton and Hove and Eastbourne and is close to Gatwick Airport. It is an affluent district, but as mentioned above, there is a prosperity gap between the more affluent parts of the district such as Lewes and less affluent coastal towns such as Newhaven.

There is an issue with the quality of retail in the town centre rather than the quantity. A large part of the town is a conservation area and there is limited scope for altering the traditional Victorian retail units, which puts large retailers off.

A number of chain stores have closed in recent years, but independent stores have held up comparatively well, and overall the town has a below-average vacancy rate. Other towns in the district, such as Newhaven, have felt the impact of recent trends more keenly.

There is a perception that parking is a problem, although the Council's view is that parking is not a disincentive to town centre visitors. Tesco supermarket in the town has a 2hr free parking policy, and therefore provides a town centre parking option for short visits.

Figure 8.29 Lewes Retail Catchment Area



Policy Framework

The Lewes District Local Plan- Joint Core Strategy- Proposed Submission Document, January 2013 was prepared in partnership between Lewes District Council and the South Downs National Park Authority and guides development and change in the District for the period up to 2030. The plan will supersede the Lewes District Local Plan which was adopted in 2003.

The plan defines Lewes as a 'main town centre', with the strategic objective of the retail policy being to:

- Maintain and enhance the vitality and viability of the district's town centres, retail centres and local centres as hubs for shopping, business, entertainment, cultural and community life.
- Stimulate and maintain a buoyant and balanced local economy through regeneration of the coastal towns, support for the rural economy and ensuring that the economy is underpinned by a balanced sector profile.
- Work with other agencies to improve the accessibility to key community services and facilities and provide the new and upgraded infrastructure that is required to create and support sustainable communities.

The policy states that Main town centres should form the primary focus for retail activity, particularly within the defined Primary Shopping Areas and Primary Shopping Frontages. Other appropriate uses include leisure facilities, restaurants, offices, arts, culture and tourism facilities. These uses will be particularly encouraged within the Secondary Shopping Frontages and more peripheral areas of the town centres.

Lewes Town Centre is identified as offering a unique, historic shopping environment which has resulted in an established character within the town centre of smaller, independent and niche retailers. These independent retailers are intrinsic to this town's character and benefit the local economy through attracting tourism visits and expenditure. The policy states however that there is an identified need for additional modern retail floorspace which caters primarily to convenience retailers. The policy supports the retention of Lewes Town Centre as the district's principal leisure, cultural and visitor destination and seeks to enhance this offer through appropriate development which reinforces the distinctive and diverse character of independent retailers and service offerings.

The document identifies a hierarchy of retail centres and has an appropriate policy approach for each area to *"allow the type and scale of retail and town centre development proposals to be tested to ensure that they are commensurate with the role and function of the relevant centre and the appropriate development types"*. The supporting text directly supports a flexible approach for the re-use of redundant or unviable retail units for alternative uses of benefit to the local community which support and maintain the vitality of the local centre or neighbourhood.

In **Building a Brighter Future, A Regeneration Strategy for Lewes District Council 2012 – 2015**, the Council and partners outlines how they will help to create the conditions to sustain economic growth over the next three years.

For Lewes Town Centre, the strategy recognises Lewes' strong position in the District and national and local initiatives such as the Transition Town movement and the Lewes Pound. It also notes that low average earnings and high house prices make housing unaffordable for many local people and the difficult public spending environment makes Lewes Town more vulnerable to job losses, given the large proportion of public sector employment.

The strategy recognises that further work needs to be done to support the creation of new jobs and businesses to diversity the town's economic so it is not dependent on jobs in tourism and the public sector. The opportunities to address this are seen as the redevelopment of the North Street area and other key town centre sites.

The current Local Plan is **Lewes District Local Plan, March 2003**, which is now out of date. It represents a sound set of policies which support a strategy of consolidation and investment in town centres, However, it does not establish a detailed hierarchy of retail centres and as such has less of a strategic focus in directing the appropriate types of development proposals towards appropriate town centre locations. There is also no real focus on change of use applications within town centre locations or a strategy to deal with vacant/redundant units. It supports the development of out of town retail if certain criteria are satisfied.

Within the Local Plan Lewes Town Centre is identified as one of the main shopping centres within the District. The Plan outlines that the function of Lewes as a shopping centre, both for day to day needs and for specialist goods should be encouraged. It is identified that for Lewes to retain its vitality and viability as a shopping centre it needs to retain its main retail activity within or close to the existing concentration of shopping in Cliffe High Street and High Street in accordance with Local Plan policies E3 to E5. It also states that in accordance with Local Plan policy E7 planning permission will not normally be granted for retail uses outside of the town centre.

Response to Challenges

Lewes is a successful town centre with a thriving independent sector. However, there are issues with the lack of suitable floorspace for larger retailers and as a result there are fewer multiples than would be expected in a town of Lewes' size.

The Council aims to focus the provision of retail in the town centre and the south of the North Street site (on the edge of the town centre) to allow connectedness and footfall with the existing town. The North Street development is a housing-led mixed use site, with a footbridge to connect into the town which will create additional population within the town and create footfall. The policy emphasis is on retaining a mix of retail uses within the centre, in order to be able to compete with centres such as Brighton, Tunbridge Wells and Eastbourne.

The current policy stance is to allow for additional comparison retail and limited convenience.

Initiatives to boost the town centre have included the well-known 'Lewes Pound', a local currency which supports local traders and strengthens the local economy and a recent one-off music festival which attracted 25,000 visitors to the town and generated over £2m for the local economy. The Council are planning to introduce a policy to allow more events of this nature.

The Council opposed the NPPF policy of permitted development allowing retail conversion to residential. This is in spite of the policy not applying to National Parks.

There is limited collaboration with other areas within the LEP outside of the Local Authority Area in terms of town centres and retail. In this respect, other town centres are seen in terms of competition rather than potential collaboration.

Figure 8.30 Lewes Town Centre



Wombwell

Characteristics

Wombwell is a principal town within Barnsley Metropolitan District Council. It is an ex-mining community, and the decline of this industry has led to the area experiencing de-population and poor socio-economic conditions. A large proportion of the workforce is employed in low value-added roles in sectors such as wholesale, retail and construction, meaning disposable income is low.

England and Lyle's Smaller Centres Study (2012) provides a detailed understanding of the role and form of Wombwell town centre. The study identifies Wombwell as having a largely linear retail and service centre along the main high street. The number of units is reported to be slightly above the national average, while its 7% vacancy rate is slightly below the national average. The centre is reported to be experiencing a change in the composition of the retail offer towards comparison goods.

The current retail offer comprises a mix of independent and multiple retailers with the general offer focuses upon lower value retail good. Larger units within the town centre are occupied by Wilkinson's, Poundstretcher and Heron foods. There are a large number of independent retailers within the town centre that provide a wide range retail offer including mobile phones, flooring and laminates and convenience goods.

The town centre has been the focus of public realm improvements, and the high street is well maintained and busy. Traffic speeds are restricted to 20 miles per hour, and the town has frequent bus services to and from Rotherham and Barnsley, and rail links to Barnsley, Sheffield, Leeds and Rotherham.

The main challenge for Wombwell is its socio-economic context. Low disposable income means local retailers face particular challenges in addition to the broader trends in spending that divert expenditure away from the traditional high street.

Policy Framework

The **2010 Barnsley Core Strategy** identified Barnsley as the primary town centre within the Local Authority District. Wombwell is classified as one of six district centres - Cudworth, Hoyland, Wombwell, Goldthorpe, Penistone and Royston.

The planning position outlined in the Core Strategy is that new retail and town centre development should be located within existing centres to help

strengthen and protect their important roles and to reduce the need to travel to out-of-town locations. The primary focus of retail development, however, is on Barnsley town centre.

The priority for district centres such as Wombwell is to ensure that they have the capacity to fulfil their important roles as Principal Towns. The Core Strategy seeks to support the town centre shopping environment via improvements in the general environment, traffic management, highway and pedestrian facilities and public transport.

Growing Barnsley's Economy (2012-2033) provides an economic strategy and five year investment plan economic investment plan for Barnsley. The vision of the strategy is to develop a successful, unique 21st century market town at the centre of the borough that offers opportunity for all.

Barnsley town centre is a key focus of the strategy through the development of a vibrant town centre with a strong and growing retail and leisure offer, a thriving and balanced business community with a series of facilities to create a major visitor draw. This aspiration is expected to be delivered via the £125m Marketplace Barnsley project and the preparation of the Barnsley Town Centre Area Action Plan.

The primary focus for economic growth outside of Barnsley town centre is the development of the delivery of a long term masterplan for the Dearne Valley encompassing 3,000 new homes, key employment sites, the provision of new retail, improvements to existing retail and public realm offer.

A high-level aspirational action plan developed by the Wombwell Community First Partnership has been produced, known as **The Wombwell Plan**. The plan aims to regenerate the high street by:

- Reducing the number of vacant shops
- Tidying unoccupied shops
- Increasing the number of market stalls
- Having a greater diversity of shops and market stalls
- Reducing anti-social behaviour and crime
- Keeping the high street clean, tidy and safe
- Controlling traffic speeds

- Sustaining free parking
- Ensuring snow is promptly cleared from high street footpaths

Many of these aspects appear to have been delivered or sustained in the period since the strategy was developed.

Response to Challenges

Wombwell town centre operates within a context of difficult socio-economic conditions, and could potentially face increasing competition from supermarkets choosing to locate on the outskirts of town.

Wombwell is showing relatively strong performance and experiences low vacancy rates. It is considered to be effective in serving its catchment and core customer base, the vast majority of which are local Wombwell residents. The town centre provides a strong convenience offer which combines independent grocers, butchers and cafes with multiple retailers such as Tesco Metro.

The primary focus of town centre regeneration and planning policy priorities within Barnsley is upon Barnsley town centre as opposed any of the borough's district centres. Smaller centres such as Wombwell are therefore primarily being 'left to the market'.

Wombwell faces challenges from both existing and new out-of-town developments. The town's rail links mean the Meadowhall centre is just 15 minutes away whilst the Cortonwood retail park is less than three miles or a two-minute drive away. A number of planning applications are currently pending for supermarkets within the surrounding area, which will take custom out of the town centre. Planning policy is not considered strong enough to stop out the expansion of out-of-town developments that threaten the sustainability of existing town centres.

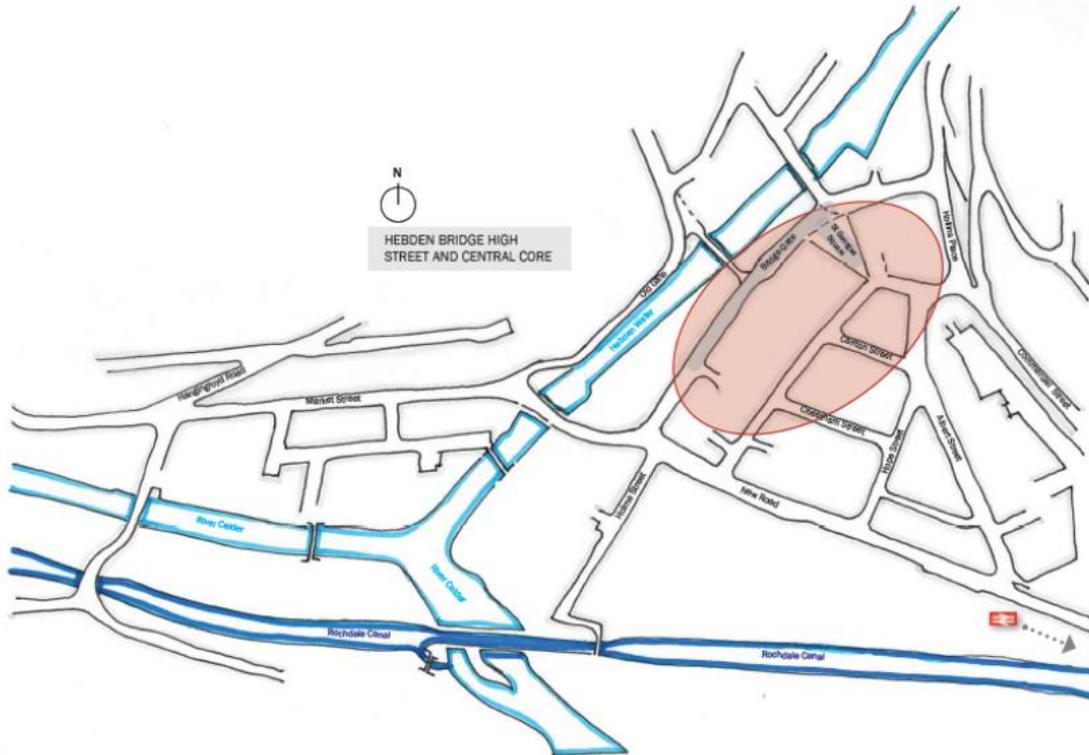
Local traders and community organisations are actively seeking to improve the town centre. The Wombwell High Street Committee organises the Christmas lights switch on event that attracted an estimated 2,500 people in 2013. The Community First Panel has developed a 'Plan for Wombwell', a key aspect of which is to regenerate the high street.

Figure 8.31 Wombwell Town Centre



Hebden Bridge

Figure 8.32 Hebden Bridge Town Centre



Context

Hebden Bridge is located within Calderdale Metropolitan Borough Council, within the Calder Valley. The town lies in between Leeds and Manchester and benefits from strong public transport links to both of these cities. Hebden Bridge initially developed as a mill town in the 19th Century before experiencing decline and de-industrialisation in the 1960's and '70's. It was then repopulated by artists, alternative practitioners, teachers, green and New Age activists. Hebden Bridge's history is important context to the review of town centre activity; the unique nature of its population is the main driver of the town centre's vitality.

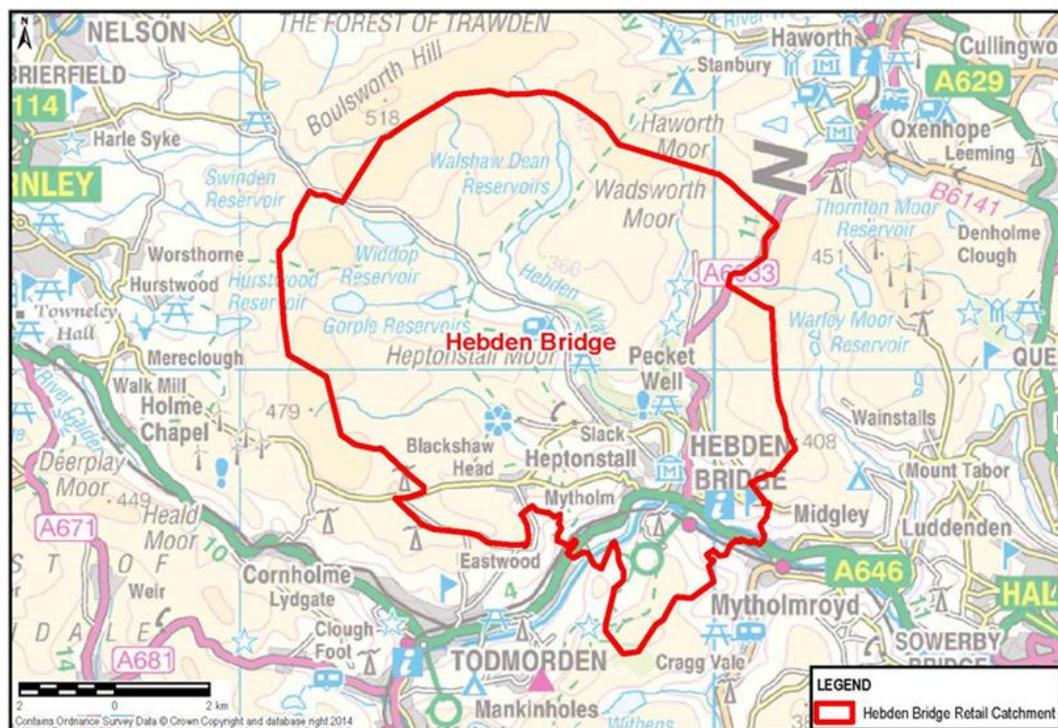
The retail offer within Hebden Bridge town centre is largely contained around the Bridgegate, Crown Street and Albert Street area and stretches along Market Street (the A646), the main route for road traffic along the Calder Valley – running from Todmorden to Halifax. Bridgegate provides a dedicated pedestrianised zone within the town centre and is considered to be the town's primary high street. It runs along the River Calder and includes a stepped area

off the high street providing a focal point for visitors and residents in the warmer weather.

The retail offer within Hebden Bridge is dominated by independent, locally-owned retailers, something which the town prides itself on and fights hard to maintain. There are only four retail multiples within the town as well as national chains of estate agents, a betting shop and a small number of charity shops. The retail offer serves both the local population and the town's significant tourism market.

Hebden Bridge has a unique heritage and character and is holding up well in the face of challenging retail trends. Its key challenge is maintaining its success and independence as online shopping becomes increasingly prevalent.

Figure 8.33 Hebden Bridge Retail Catchment Area



Policy Framework

Calderdale Council is currently developing a Local Plan as a replacement for the Calderdale UDP, the **Calderdale Core Strategy Objectives and Policy Options, 2011**. The Local Plan is expected to be completed in 2017. The Core Strategy Objectives and Policy Options paper provides information to underpin the strategic objectives within the proposed Core Strategy.

The key policies seek to create a resilient sustainable economy founded upon innovation and enterprise, building on the location and exceptional character of Calderdale. A key objective of the policy is to create vibrant, lively town centres. The Core Strategy objectives are underpinned by a Calderdale Retail Needs Study, which looks ahead to 2026. The study did not identify any additional capacity needs in Hebden Bridge. Developed by **Hebden Bridge Partnership**, the 2020 Vision - Hebden Bridge in 2020: A Better Place for All has been prepared to 'suggest ways in which Hebden Bridge can be an even better place in the future than it is today'. The vision statement highlights Hebden Bridge's independent retail offer within the town centre as one of its key strengths. Priorities for improving the town centre include:

- Improving pedestrian access across the A646
- Pursuing a shared space near Hebden Bridge Town hall
- Increasing pedestrianisation within the town centre
- Supporting local independent businesses; and
- Seeking to relocate the market to Lees Yard.

The **Replacement Calderdale Unitary Development Plan 2006** takes into account the policies within the (now abolished) Yorkshire and Humber Regional Spatial Strategy that ensure that town centres are the main focus of shopping, cultural, social, leisure and business services. The West Yorkshire Retail Capacity Study identified little scope for additional retail provision in Calderdale up to 2011. However, the Council reports that existing shopping patterns are not regarded as sustainable due to large spending flows outside of Calderdale for convenience goods. The policy is therefore supportive of additional retail provision that reduces the need for travel to locations such as Leeds, Bradford and out of town centres such as the Trafford Centre.

The UDP defines a shopping hierarchy to help plan retail development, with Halifax being at the top. More generally, sequential testing is used to ensure

that central or edge-of-centre sites are developed in preference to out-of-town sites. The key retail development opportunities detailed within the UDP are primarily concentrated within Halifax, with one site in Elland and another in Brighouse.

Response to Challenges

Hebden Bridge is unique in terms of its history and the composition of the local population. The town centre, as well as the wider town, is thriving although the reasons for its success are complex. It provides a high quality public realm and makes strong use of local assets such as the River Calder.

Vacancy rates within the town centre are widely considered to be low with the retail property market being buoyant. Vacant properties are reported to be occupied within a short period of time. There is also continued demand for cafes, and so vacancy is not a current problem. In one instance, a vacant property has remained unoccupied due to the landlord being reluctant to improve and occupy the building. The Town Council, along with the Borough Council, have worked proactively to address this situation by offering funding assistance to improve the property as it is considered to have a detrimental effect on neighbouring retailers. The Town Council have a good relationship with town centre landlords, most of which only own a small number of properties.

The town has been particularly successful in attracting and sustaining independent retailers, which have been supported by the community's desire to form co-operatives to take ownership of businesses, and to develop initiatives to encourage the purchase of local produce. Community action is also central to the vibrant annual events programme within Hebden Bridge. This level of activity has provided a sense of ownership of the town centre that contributes to a vibrant retail and town centre offer.

Community asset transfer mechanisms have been used to secure the future of the Hebden Bridge Picture House and Hebden Bridge Town Hall, both of which are central to the town centre's success. The picture house seats almost 500 people and is successfully owned and managed by Hebden Royd Town Council. It is therefore central to the entertainment offer within the town centre and acts to increase footfall. The town hall was transferred to Hebden Bridge Community Association in 2011 and has since been redeveloped to provide business and conferencing space and a large hall that is used for community purposes.

The Hebden Bridge Partnership acts as a Town Team and has been in existence since 2001. They used the £10,000 of funding received to develop an action plan for the town – 2020 Vision. This includes a number of town centre priorities such as improving accessibility, reducing congestion and support local independent businesses. There are currently moves to re-establish a business association to further promote Hebden Bridge.

Hebden Royd Town Council, along with the surrounding hilltop parishes, is seeking to develop a neighbourhood plan for Hebden Bridge that will include the town centre. Work is yet to start on the neighbourhood plan as the Town Council are waiting for the Local Plan to be adopted before proceeding. There are concerns locally regarding the timescales associated with finalising the Local Plan and the capacity of the town council to deliver an effective neighbourhood plan given their limited staffing resources and planning expertise.

Hebden Bridge town centre hosts a number of events throughout the year. These are primarily organised by the community themselves and make use of the town centre's high quality public realm on Bridgegate. Events include the highly successful hand-made parade, the Hebden Bridge arts festival and a Streets Choir festival, all of which bring significant tourism, footfall and additional spending to Hebden Bridge.

Figure 8.34 Hebden Bridge Town Centre



Type 4 Centres: Small, strong socio-economic context, thriving

This typology is almost exclusively found in strong socio-economic contexts. The catchment sizes for both comparison and convenience goods are generally small, though some centres achieve above-average comparison goods sales. They are diverse, attracting a range of types of spending beyond retail.

The case study areas have shown that these types of town centres, e.g. Lewes, Horsham and Hebden Bridge, seem to have held up well against the recession and have experienced relatively low vacancy levels. There are strategies and plans in place guiding new development to appropriate locations, promoting flexible units for modern retailers, supporting flexible use of vacant units, and encouraging a diversity of uses. In the case study areas there has been a strong centre management team, including events and marketing and exploring innovative ideas such as digital technology. There is strong community involvement, including community action such as transfer of assets. The other town in this group, Wombwell in the Leeds City Region has experienced a decline due to the effects of out of town retail development. Wombwell would benefit from greater focus on improving the socio-economic conditions and a focus on how deprived areas can be better linked to areas of economic opportunity within the City Region e.g. Leeds.

The competitive advantage of many of the towns in this typology lies in their unique heritage. Smaller town centres can create a niche shopping and leisure experience to complement larger neighbouring towns and out of town retail areas and this is a clear strength of Lewes, Horsham and Hebden Bridge.

Policy should focus on maintaining the success already achieved, and monitoring visitor satisfaction to ensure the centres continue to deliver an attractive experience.

Figure 8.35 Type 4 Towns: Recommendations

Policy
<p><i>National</i></p> <ul style="list-style-type: none"> • Encourage partnership working between local practitioners, to ensure policy decisions are beneficial to all town centres in an economic region.
<p><i>Local</i></p> <ul style="list-style-type: none"> • Develop local policies that build on the unique character of the area.

<p>Smaller town centres can create a niche shopping and leisure experience to complement larger neighbouring towns and out of town retail. Redevelopment activity should be sensitive to its context</p> <ul style="list-style-type: none"> • Keep abreast of changing consumer preferences through visitor surveys, to ensure that the centre continues to attract footfall and consumer spend • Consider allowing conversion of retail and other uses to residential in town centre. However, this needs to be balanced against the need to provide essential local services and support aspirations for the town centre. • Monitor the evolution of commercial property prices and rents, and act to mitigate any potential negative impacts on small businesses through business rate relief if necessary • Adopt new technologies as demand dictates, including through the use of libraries or post offices as digital hubs
<p>Examples of good practice</p>
<ul style="list-style-type: none"> • Horsham has an extensive calendar of town centre events which encourages footfall on several days throughout the year. • Horsham Unlimited, a business partnership which plays a key role in steering investment by the council and attracting contributions for a wide range of initiatives has helped to maintain the town's success. • Positive examples of collaboration including several of the local authorities' involvement in the 'Gatwick Diamond' working group to improve coordination at a strategic planning level across the sub region on issues of sub regional importance, and membership of the Association of Town and City Management to share knowledge and best practice. • Horsham District Council has adopted a Supplementary Planning Document for Horsham town providing detailed guidance and policies for development in the town centre. • Hebden Bridge capitalises on its unique character with strong community involvement and collaborative working at the local level.
<p>Other initiatives to consider</p>
<ul style="list-style-type: none"> • Invest (or continue to invest) in place branding and marketing • Encourage local food and craft producers to trade in town

centres. e.g. through Farmers' Markets.

- Promote neighbourhood planning to include high streets where appropriate. This could for example be done by encouraging retailers and town centre owners to be more involved in or even lead on neighbourhood planning.

National: Central Government (DCLG, BIS, HM Treasury)

Local: Local Planning Authorities, LEPs, BIDS, town teams, town centre partnerships/managers, chambers of commerce, neighbourhood planning groups

9 Conclusions

9.1 Recent Trends

At the heart of the debate about the future of the high street is the question of how more people can be encouraged to use the high street more often. Given that the changes to behaviour brought about by technological change are here to stay, this has to mean the high street acts in a way that complements as well as competing with online shopping, by offering an experience to visitors and allowing a greater mix of uses to operate on the high street in addition to retail. High streets need to be flexible as consumer behaviour continues to evolve, and tailored local planning policies are needed to address the differing needs of different centres, including encouraging consolidation in some areas to achieve long-term sustainability, and planning for growth and diversity in other areas that are performing well and are viable and sustainable.

Recent trends and drivers of change in the high street are well known and include:

- changing consumer expectations e.g. a combined shopping and leisure experience
- demand for convenience
- on line shopping and multi-channel shopping (including in-store, online, click and collect)
- out-of-town retail
- smaller format supermarkets
- an ageing demographic
- a lack of diversity within and between centres, and
- difficult economic conditions.

Some of these, such as the recent recession, are short-term and cyclical, while others, such as the rise in internet shopping, are long-term and structural. Many of the trends are linked and one may be accelerated by, or mitigated by, another. The trends affect different types of places in different ways: some are local trends impacting locally, and others are national trends that have a local impact; and as such require a tailored policy approach,

whether national policy with national delivery and decision making, or national policy with local delivery. There are also a range of activities that are not policies, but fall within an area of policy interest. There are a range of decision makers with varying degrees of influence on each policy area, from central and local government to LEPs, BIDs, chambers of commerce and town centre management teams.

Recent reports (Verdict, 2014²⁸) have indicated that UK town centres have returned to growth in 2013, recording the first growth since 2007, driven particularly by the food sector. It has also been reported that high streets are faring surprisingly well, and have out-performed out-of-town shopping centres in terms of vacancy levels, driven by discount stores and smaller-format supermarkets (Deloitte, 2014²⁹). There is a growing awareness of a new era of retailing focusing on convenience, value for money and a growing demand for authenticity in shops and in town centres themselves.

Forecasters expect the town centre resurgence to continue for the next five years. However, they also expect that space and store numbers will decline as the growth of online reduces the need for a large portfolio.

The product mix of high street stores will change as, for example, books and music are increasingly replaced by digital and streaming content, and furniture and gardening products are sought in out-of-town retail parks offering a greater range and cheaper prices.

Discount retailers or 'pound stores', which have flourished in the economic downturn are expected to continue to thrive, as shoppers continue with recession shopping habits, and businesses capitalise on the number of vacant units available. Due to their relative protection from online shopping, and ambitious plans for expansion, they are expected to play a key part in the future of a range of high streets, which will help to reduce vacancy rates and attract greater footfall. However, towns with a high proportion of pound stores could put off potential investors and consumers and may have a negative impact on image and perception of the area.

The use of WiFi in retailing is expected to grow. This is a challenge for the high street. Making use of WiFi on the high street, as a collection of separate retailers, is a difficult co-ordinating exercise.

²⁸ Verdict, UK Town Centre Retailing 2014

²⁹ Deloitte, The Changing Face of Retail 2014

9.2 Implications for Town Centres

These recent trends have a range of implications for high streets, including a reduction in the number of high street retailers, a change in the composition and offer of the high street, reduced spending in town centres, a loss of social capital and associated economic effects, an increased polarisation of centres, where the successful continue to thrive and the weak continue to struggle, with a potentially vicious circle of decline in attractiveness and lack of inward investment.

This study has found that while there is a widespread awareness of recent trends in the high street and the drivers of change, there is a marked difference in the readiness of different types of centre to respond to the changes. Different local planning authorities are at different stages of plan making in relation to their local plans and various associated strategies underpinning their plans, and there are varying levels of political support, effective management and community interest in high streets, often depending on the socio-economic context.

The policy review has shown that town centre policies are essentially defensive in seeking to protect town centre activities rather than promoting new activity. This change of emphasis is part of the 'positive planning' message coming from the National Planning Policy Framework and should include consideration of how new activities complement different types of centre nearby.

Consultation has found that planning policy often lags behind the changes on the ground, and that changes to planning policy takes time to implement.

Neighbourhood planning can potentially be an effective way of bringing about change on high streets and the initiative is beginning to gain momentum, with a large number of neighbourhood plans being started. However, research conducted for this study suggests that few communities are making high streets their primary focus, with housing being the priority for the most part. For high streets that serve a local catchment, communities should be encouraged to include high streets in their neighbourhood plans.

Although part one of this report groups towns with similar characteristics, each town centre and high street also has its own unique circumstances, due to its physical, socio-economic and historical context and as such each faces its own set of challenges. The new National Planning Policy Framework has been generally welcomed by the stakeholders that were spoken to as part of this research, who felt that it provides a good framework for a flexible response tailored to each individual town's needs.

9.3

Successful Initiatives

Government policy (planning policy and other policy areas such as business rates) is a crucial part of planning for the future of high streets, but as this research has shown, it often takes time for policies to be implemented and to take effect. In the shorter term, and particularly effective for smaller centres, it can be activities and initiatives that makes a difference to the high street's performance. For example the success of Hebden Bridge appears to be down to the community involvement, strong town council and good partnership working rather than a change to the policy framework. Similarly, Horsham in Sussex has seen an increase in town centre performance which has been attributed to a combination of good partnership working between businesses and a well organised calendar of popular town centre events.

Towns that have focused on diversifying their offer and introducing more leisure activities, increasing the attractiveness of the town centre, have seen good results e.g. Horsham is successful because of a concerted effort to promote the leisure and the food and drink offer in the town.

A number of the case study areas have seen the temporary use of vacant shop units such as pop-up shops or artists' galleries (e.g Croydon, Horsham, Lewes, Hebden Bridge) and even health facilities (Dewsbury), which has been encouraged under the new permitted development rights. In all cases this has contributed to the vitality of the high street by increasing footfall, enlivening the area and reducing unsightly boarded up windows as well as helping landlords meet property costs. Some of the case study areas had made links with local farmers to sell produce in empty units in the town centre which has been welcomed by local people.

Markets can be a popular town centre facility for local people and can significantly add to the retail presence and diversity in a town centre. Two of the case study areas, Dewsbury and Wombwell, have dedicated market days which significantly add to footfall (as much as 60% in Dewsbury). It is also something that can be coordinated between neighbouring high streets, with markets on different days in different towns. Off seasonal and specialist markets can also be effective in drawing people into the town centre.

Small scale initiatives such as shop front improvements can make a difference to the attractiveness of a town centre. In Croydon a shop front improvement scheme is in place where business owners have been asked to contribute 10% of the costs in return for valuable professional design expertise.

9.4

Spatial Interaction Between High Streets

The case study research has shown that town centres are still viewed largely in terms of retail by decision makers, and retail is seen in terms of catchment areas and competition with other town centres outside the local authority area.

There is currently little collaboration between town centres, particularly at the local authority level, although most local authorities do think about the town centres within their planning areas as being in a hierarchy for planning purposes. It seems to be common to share knowledge and best practice in relation to other sectors, but town centres' retail offers are often seen as being in competition with other, and the mutual benefits of sharing best practice or working together are not immediately apparent to policy makers. An exception to this is at the town or city centre manager level where the Association of Town and City Management (ATCM) group is seen as a valuable resource for knowledge sharing amongst practitioners. The Gatwick Diamond working group, which uses public/private sector collaboration and partnership to promote activity that will make a measurable difference to the economy, including contributing to public sector decision making at a local, regional and national level, is a step in the right direction and could be emulated by other LEPs. However there could be more focus on the importance of town centres to the economy and a role in coordinating town centre practitioners to work together to achieve mutually beneficial improvements.

Understanding the spatial interactions between towns in a wider economic area is crucial to the decision making process relating to town centres. The Leeds City Region is a polycentric region, with towns of differing economic strengths and sizes, the smaller towns and cities such as Harrogate and Hebden Bridge complementing the economic core. Neighbouring towns and cities also benefit from Leeds as a market for goods and services and to provide jobs for the residents. However not all towns and cities are benefitting equally, and towns with a weak socio-economic context such as Dewsbury (largely due to its industrial legacy) have struggled to replace industry with a new economic model and are struggling as a result. These town centres would benefit from greater focus on linking the wider area of deprivation to areas of economic opportunity in the city region and the resulting socio-economic benefits would help to support the local high streets.

The second LEP case study area included in the research was Coast to Capital, which includes the London Borough of Croydon. London's influence on Croydon is by far the biggest external influence in terms of employment, retail, leisure, culture and other services. In addition, Croydon competes with towns within and outside the M25 such as Guildford and Maidstone, as well as regional shopping centres such as Bluewater. The ambitious regeneration plans for Croydon – to make it London's 'Third City' – are set within the

regional framework of the London Plan and therefore policy decisions are made in light of the wider London context.

Apart from Croydon and its partnership within the Greater London Authority, there is currently a lack of strategic attention to the relationships between towns apart from at a local authority area. The LEP areas as a whole would benefit from greater focus on the comparative advantage of each town, how each town could best forge a niche targeting a particular market and building on their unique assets. Robust, evidence based policy decisions could then be made accordingly. Local authorities, ideally coordinated by LEPs, should work together under the duty to cooperate where there are issues that are common to two or more local authority areas, to assess the need to either consolidate town centre floorspace, or provide for more floorspace in town centres and set out a strategy for providing a balanced network of centres with roles and functions appropriate to their size and character. This work should take account of the important inter-relationships between centres within and beyond the regions boundaries.

9.5 **The Importance of Footfall Throughout the Day**

The recent Centre for Cities report³⁰ highlights the importance of office space as a driver of daytime footfall, concluding that city centre retail relies on footfall as this determines the size of the market that retailers can sell to, and that jobs located within city centres make a big contribution to weekday footfall. However demand for office space has been falling in some of the case study areas, particularly Croydon, which has seen a steady reduction in decline as a result of reduced demand for back office space and competition from other centres such as Canary Wharf. Croydon is addressing this issue on two fronts: by encouraging the conversion and redevelopment of surplus office space to other uses such as residential and by improving and updating the stock of remaining office space to be attractive to modern occupiers.

This is linked to a wider point about the importance of footfall in a town centre throughout the day and throughout the week. Increasing the diversity of the town centre, through allowing a more flexible use of land and properties for businesses, residential and other uses can help to sustain footfall throughout the day and night, the week and the weekend.

³⁰ Beyond the High Street – Why our City Centres really matter, Centre for Cities (September 2013)

However, decision-makers will need to look at the overall economic health of a town centre to ensure that essential local services are not affected and that the town centre provides an adequate supply of retail units to meet the needs of the population it serves and the aspirations of the town for the future as articulated in the town centre strategy.

9.6 Public Sector Intervention

One of the key questions for practitioners involved in the high street is at what level policy should be set and decisions be made. The National Planning Policy Guidance is deliberately non-prescriptive to allow interpretation at the local level. The case study groups broadly welcomed this, and felt national policy allowed the flexibility for local areas to set local policy specific to the local context and needs.

There is evidence of positive public private partnership working in the case study areas. On a large scale, in Leeds and Croydon the private sector investment in new and redeveloped town centre shopping malls has been facilitated by strong public sector leadership. On a smaller scale the emergence of a number of BIDs and Town Centre Partnerships (Croydon, Horsham, Hebden Bridge) whereby the public sector works in partnership with businesses and community groups, has had tangible effects on the high street's performance by putting in place a framework which encourages businesses to collaborate in the provision of activities such as marketing, public realm improvements and crime reduction. This is a good example of public sector intervention being justified to tackle market failure, where intervention has overcome co-ordination problems in the provision of goods with positive externalities for retail, leisure and service businesses³¹.

Without co-ordination there is likely to be under investment by retailers and businesses. Investment in these activities may encourage more visitors to a high street and in turn, encourage greater investment, to the benefit of wider society.

In cases of market failure in town centres, as has been seen in some of the case study areas such as Dewsbury and Newhaven, it would be appropriate for the public sector to intervene.

There may also be a case for decentralisation of decision making powers for particular town centres types. The case study research showed that permitted development rights were welcomed in some areas, where LPAs were keen to let the market dictate the pace of conversion from e.g. office to residential. In

³¹ The tests of market failure and when the public sector should intervene are set out in HM Treasury's *The Green Book: Appraisal and Evaluation in Central Government* (July 2011)

other areas this change was resisted due to fears of loss of office space and harm to businesses and several local authorities have applied for exemptions from the policy.

The devolution of financial powers was also mentioned in one of the case study areas (Leeds) by practitioners struggling to make long term planning decisions when financial decisions were reviewed on an annual basis.

9.7 **Recommendations**

The recommendations for decision makers relating to different types of town centre are set out in Chapter 8 of this report.

At the national level government departments including DCLG and BIS should ensure that coordination of town centres within an economic area is encouraged.

At the local authority level, where local policy is set, LPAs should articulate plans to address town centre issues through their Local Development Plan town centre strategies, as required by the new National Planning Policy Guidance (DCLG, 2014). This guides LPAs to identify changes in the hierarchy of town centres, including where a town centre is in decline.

For each town centre local authorities and neighbourhood groups should take the lead in supporting the high street and promoting collaboration with businesses and other stakeholders in the town centre, as well as with other town centres both within the local authority area and beyond. This will help encourage greater innovation and confidence in exploring new policies to respond to the trends discussed in this report and underpin a town centre revival with high streets that are flexible and sustainable and can adapt to existing and future trends.

Appendix A: Overview of Relevant Literature

Reviews of High Street/Retail Trends and Policy Implications

Understanding High Street Performance, Genecon LLP for Department for Business, Innovation and Skills (December 2011)

This report reviews the drivers and barriers which impact on the performance of high streets, in order to inform central and local government decision making regarding town centres and economic growth.

It notes the following high street trends:

- The rise of out of town shopping at the expense of traditional high streets
- Increasing vacancy rates
- A homogenisation of the high street and ‘brand grabbing’ by landlords
- A change in shopping patterns – consumers looking for ‘experience’ and greater choice.

It groups the drivers of change into:

- Externalities such as wider economic circumstances and government policies
- Spatial and physical factors, such as large format stores and a move away from the linear high street
- Market forces and competition including the question of how much consumers value the offer of their high street
- Demographics
- Regulation, legislation and management specific to town centres

Responses to high street trends have included:

- Improving the built form and configuration

- A drive for differentiation, including the use of social media and loyalty schemes
- Policy prioritisation, including using planning and licensing powers to counter the effects of out of town shopping, and neighbourhood planning
- New management models, such as Town Centre Management and BIDS
- Other approaches to delivery and new business models, such as cooperatives, social enterprises and imaginative uses of community assets

The report defines four Key Performance Indicators (KPIs) which can be used by local authorities and partners to understand a high street's performance: footfall, consumer and business satisfaction, diversity and economic activity. It suggests that an adequate footfall indicator would require a set of locally chosen sub-indicators, which could include length of stay, number of places visited and frequency of visits. The report also suggests potential indicators of diversity, including the number of eating establishments, tourist attractions, shops, and the quality of public transport access. Economic activity sub-indicators may include consumer spend, non-retail business turnover, businesses sectors represented (including social enterprises) and new investment and development activity. Although the mechanisms by which they may be developed are discussed, the report does not gather or analyse any town centres data.

The report notes that any measurement of performance needs to avoid 'retail bias', whereby high street performance is seen purely through the lens of retail performance, while data on other aspects of high street vitality, or the prevalence of cultural, heritage and leisure uses, are overlooked.

The Portas Review – An Independent Review into the Future of our High Streets (December 2011)

This is an independent review commissioned by the Government of the state of England's high streets and town centres.

The Portas Review primarily focuses upon the decline of the high street as a result of a number of key trends:

- Less than half of our retail spending is on the high street and this figure is falling- fuelled by the boom in retail and property values national retailers crowded the market with stores which after the bust

occurred were vacated revealing the lack of a strong independent base to our high streets

- Retailers need fewer shops- with the change in the consumer landscape away from bricks and mortar towards the rise in internet shopping retailers need fewer stores and thus there are increasing closures by national brands in the high streets.
- 21st Century Urban Entertainment Centres- out of town shopping malls are increasingly drawing the market share of footfall due to their 'convenience'
- Supermarkets are increasingly expanding their share of national grocery sales as well as expanding their offer of non-grocery sales such as clothing and even into providing health services;
- Consumers are displacing the high street for 'convenience'

In response, the Portas Review suggests the following solutions:

- Put in place a 'town team'- this would be visionary, strategic and strong operational management team for high streets to develop a sustainable and relevant offer for the future. This collaboration could include key landlords, large and small shopkeepers, council representatives, the mayor or MP, other local businesses and service providers and local residents
- To empower successful BIDs to take on more responsibilities and powers to become a Super-Bid- these would develop a dynamic strategic vision for their towns to shape the high streets of the future. Landlords should also be legislated to become high street investors by contributing to their local BID
- It should be made easier for local people to become market traders by removing unnecessary regulations so that anyone can trade on the high street
- Local authorities should use their new discretionary powers to give business rate concessions to new local businesses- start-ups should be the number one priority. Councils could also use these powers to allow local businesses to pay rates over 12 months rather than the standard ten

- Local areas should implement free controlled parking schemes that work for their town centres- high streets need to have a more flexible, well communicated parking offer
- Town Teams should focus on making high streets accessible, attractive and safe- this should primarily stem from good urban design and management
- The restrictive aspects of the use class system should be addressed to make it easier to change the uses of key properties on the high street- it should be straightforward to use Local Development Orders which would have a big impact on the number of empty properties and encourage more creative use of second, as well as first floor space on high streets
- Further disincentives to prevent landlords from leaving units vacant should be explored- vacant properties attract vandalism and increase insecurity and fear. Portas suggests that local authorities should lead on this issue suggesting that empty local authority units could be managed as a showcase for local micro-businesses enabling new ventures to test their ideas and profitability before committing to bricks and mortar investment
- Banks who own empty property on the high street should either administer these assets well or be required to sell them- local groups should be encouraged to use the Community Right to Buy as a method of taking on empty properties owned by banks
- Local authorities should make more proactive use of Compulsory Purchase Order powers to encourage the redevelopment of key high street retail space- local authorities should engage with landlords to ensure that their properties do not degrade to the point of blight
- Local authorities should be empowered to step in when landlords are negligent with new 'empty shop management orders'- Portas proposes these new orders would allow council's to enter and upgrade when landlords are negligent. They could then manage them, rent them and use the frontage for advertising
- Promote the inclusion of the high street in Neighbourhood Plans- plans should include a consideration of what social and retail mix local people would like to see as well as the kind of shops and services they value

The imaginative community use of empty properties through Community Right to Buy, Meanwhile Use and a new 'Community Right to Try' should be supported - this would allow innovative ways to ensure that empty properties remain a part of the high street and not a blemish on it.

The Grimsey Review – An Alternative Future for the High Street (September 2013)

This is an independent review of the state of England's High Streets and Town Centres in response to the Portas review in 2011.

The review argues that there is currently too much retail space and that the focus of high streets and town centres should be reinvented as community hubs. Grimsey argues that there should be a town centre commission for each town which should develop a 20 year vision for the town supported by 5 year business plans.

The Grimsey report suggests that business rates should be frozen and that any occupiers of units that have been vacant for 12 months should receive 50% rate relief for two years. Revaluations should be based on annualised CPI rates rather than one month snapshots.

The report also suggests some interesting innovative ways to support start-ups and small businesses such as establishing opportunities for crowd funding for local people to invest in their local community and businesses. Change of use should also be able to be used to convert entire sub-high streets to residential or other uses within the agreed high street plan and relocate the successful independent retailers into the main commercial centre.

The review reached three specific conclusions:

- Town centre/high street plans must encompass a complete community hub solution incorporating; health, housing, education, arts, entertainment, business/office space, manufacturing and leisure whilst developing a day time, evening time and night time culture where shops are just a part of the total plan
- A number of radical government actions are required in order to create a level playing field which will provide conditions for town centres to facilitate change, encourage local investment, cutting through red tape and providing a common set of measures to track performance
- A methodology and timetable is required to enable all local authorities to produce a town centre business plan complete with timelines, capital and revenue costs and benefits. The output for each town

centre will be different identifying their own individual selling proposition and vision based on their unique heritage

21st Century High Streets: What Next for Britain's Town Centres? British Retail Consortium (November 2012)

This report has been produced by the British Retail Consortium in response to concerns about the future of the high street. It recognises the diversity of high streets across the country and emphasises the need for each location to develop distinctive local solutions tailored to local challenges and needs.

It highlights a number of key areas that both local and national government can focus on to create the conditions for high streets to once again thrive. These themes are summarised below.

- Creating a unique sense of place, including marketing a high street's identity effectively, making the most of unique assets, strengthening the town centre's employment base and developing a strong civic, community and cultural mix to strengthen ties between consumer and the high street
- Creating an attractive public realm and managing it well
- Using the planning system to the high street's advantage, including not only facilitating development, but mitigating bureaucracy, using new forms of public/private investment such as Tax Increment Financing (TIF) and Local Tax Re-investment programmes (LTRIP) to leverage much needed funding into high streets, working with neighbouring authorities to ensure a strategic approach to development, ensuring appropriate retail diversity and a complementary retail offer, and effective planning guidance (to support NPPF) to prevent uncertainty and hindering development
- Improve accessibility, including providing adequate parking in 'consumer friendly' locations, incentivise public transport use and relax delivery restrictions where appropriate to reduce congestion and improve efficiency
- Improve safety and security
- Implement supportive regulatory and fiscal regimes, including creating a more competitive tax system, addressing the business rate burden, granting discretionary business rate discounts, using the Community Infrastructure Levy to support economic development, go further on

the deregulatory agenda for businesses, supporting BIDS to facilitate additionality and promote effective management of town centres

Planning for Growth: the role of Local Enterprise Partnerships in England - Royal Town Planning Institute (March 2014)

This interim report assesses the role of LEPs in the statutory planning system as well as considering the potential alternative strategic planning mechanisms. It provides a number of findings that are of relevance to this study in terms of understanding LEP's influence in planning issues within their areas:

- Their role is predominantly related to promoting economic growth within their areas with key functions including housing; planning and transport; access to finance; and supporting business start-ups.
- Fundamentally, LEPs are non-statutory entities without a clearly defined role in the formal planning process. The lack of democratic mandate for LEPs places limits on any extension of their planning role.
- LEP engagement in planning has varied to date with some being reluctant to get involved in politically driven agendas. Others have played a more positive role that can be typically classified as one of the following functions:
 - A business perspective/voice to inform policies, decisions and funding;
 - Strategic visioning and 'soft forms' of spatial frameworks to provide the strategic context for statutory local plans;
 - Information, intelligence and evidence sharing;
 - Multi- area planning accords to make the planning process more business friendly;
 - A coordination role to reach broad consensus over 'larger-than-local' priorities. This has involved providing a voice and lobbying role for business and facilitating decision making on strategic planning.
- Some LEPS have developed strategic spatial frameworks in collaboration with local planning partners. However, these are non-statutory and therefore provide a helpful context for local plans and core strategies.

The report provides useful context for this study as concludes that LEPs are typically on the periphery of the planning process. However, LEP engagement within town centre agenda is not explicitly addressed in this document, a factor that will be addressed in this study.

Re-imagining the high street: Escape from Clone Town Britain, New Economics Foundation (September 2010)

This report has been produced by the New Economics Foundation to investigate the homogenisation of the high street. It acts as an update to the 2005 Clone Town Britain report, which drew attention to the increasing domination of large chain stores, arguing that this left communities and high streets vulnerable to economic shocks.

The report updated the 2005 analysis to quantify the 'Clone Town' characteristics of a town centre. It builds a simple diversity index as follows:

- proportion of independent shops: 75% of total score
- presence of different types of shops: 25% of total score

The implicit assumption the report makes is that homogeneity has a negative impact on the health of a town centre. In practice, however, this would be difficult to prove, since many of the negative consequences that are argued to result from so-called clone towns, such as a diminished sense of community and urban character, are unlikely to be captured by any quantitative measure of town centre performance. The report compares the updated 2009 figures with the original 2005 study, and finds that the prevalence of clone towns, by the diversity index described above, has fallen slightly between the two periods.

The report recommends the following local policy measures to support the diversity of town centres:

- Establish High Street Hubs in vacant shops to accommodate activities that help develop local economic sustainability, with cited examples including pursuing the principles of Shared Space and developing local currencies such as the Brixton Pound
- Make residents an equal partner in masterplanning processes. The process should incorporate well-being, distinctiveness and sustainability indicators
- Ensure resident participation in Business Improvement Districts, which can generate funds to improve the local environment and attract visitors

The report also recommends national policies to encourage town centre diversity:

- Roll out sustainable investment vehicles, such as the Post Office Bank and a Green Investment Bank
- Develop a land registry of commercial property to allow greater transparency of town centre property ownership
- Create an Empty Dwellings Management Order instrument to give Local Authorities the power to bring empty buildings into active use for the benefit of the general public
- Establish a Local Competition Ombudsman as recommended by the Competition Commission
- Introduce an addition to the small business rate relief giving local authorities powers to offer discretionary business rate relief for new low carbon businesses moving on to the high street and to existing small and medium independent businesses who commit to reducing their carbon use
- Introduce well-being indicators into all Planning Policy statements

The Changing Face of the High Street: Decline and Revival, English Heritage (June 2013)

This report examines the state of the retail sector and development trends in England, through an analysis of case studies of 'in town' retail development. Its focus is on the tensions that exist between rejuvenating historical town centres, and preserving their unique character.

The report reflects upon the causes of the changing spatial form of retailing. It cites wider changes in society, such as technological advancements, increasing social mobility and changing tastes, as causes. The growth of out-of-town shopping, compounded by the impact of online retailing, has created significant challenges for traditional high streets; problems that have been exacerbated by the recent economic downturn.

This report identifies three examples of good practice in retail development, high street revival and town centre management. The first is smaller-scale retail development, and the study explores four case studies to highlight the role that sensitive improvements can play in rejuvenating a retail environment without comprehensively altering its historic fabric.

The second is the successful integration of large-scale development with existing historical areas. In many of the examples cited, the scale of development has been driven by a commercial imperative to transform the quality and format of retail and commercial floorspace available to tenants. It argues that, without this decisive response to the demands and aspirations of modern retailers, they may seek alternative locations, including competing centres or out-of-town destinations. However, although investment of this type often provides a positive economic outcome, the degree of transformation can have a damaging effect on the existing townscape if not carefully managed.

The final example of good practice is around the role that entrepreneurial involvement and partnerships can play in regenerating historic centres. Examples of good practice include evolution of town centre management through Business Improvement District schemes and the positive role public-private partnerships can have alongside coordinated town centre management initiatives.

UK Town Centre Retailing, Verdict (February 2014)

This report assesses the health of the retail sector, looking at out-of-town as well as traditional high street centres. Using market research data on retail spending by type, the report finds that town centres returned to growth in 2013, for the first time since before the economic downturn, and that they are projected to grow by 1% in 2014.

The report finds that the improvement in retail performance is driven predominantly by the convenience sector and the growth of fixed price retailers. Food retailing is identified as being particularly buoyant, with large retailers diversifying their convenience offer and opening smaller, local 'top-up' shops.

The report identifies a trend towards shopping centres promoting free Wi-Fi technologies to provide a higher level of in-store service. It predicts a decline in the home entertainment and DIY sectors within town centres, as consumers continue to migrate to larger specialist out-of-town retailer parks for such products.

National Planning Policy

National Planning Policy Framework, DCLG 2012

The NPPF sets out the Government's planning policies for England and how these are expected to be applied. It also provides a framework within which local people and their councils can produce their own local and neighbourhood plans.

Ensuring the Vitality of Town Centres

This aims to encourage planning policies to be positive and to promote competitive town centre environment as well as drawing up policies for the management and growth of centres over the plan period. It states that in drawing up Local Plans, local planning authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites
- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres
- Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and

- Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

It states that planning authorities should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only in out of centre sites where suitable sites are not available. Preference should be given to accessible sites that are well connected to the town centre.

An impact assessment should be required for retail/leisure and office developments outside of town centres which are not in accordance with an up-to-date local plan if the development is over a proportionate locally set floorspace threshold (default is 2,500 sqm). The assessment should refer to the impact of the proposed development on existing, committed and planning public and private investment in a centre or centres in the catchment of the development and the impact of the proposed development on town centre vitality and viability.

In terms of planning for community facilities, NPPF states that planning policies and decisions should:

- plan positively for the provision and use of shared space, community facilities (such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship) and other local services to enhance the sustainability of communities and residential environments;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise in a way that is sustainable, and retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

National Planning Policy Guidance, DCLG, 2014

The NPPG contains guidance relevant to retail development; the 'Ensuring the vitality of town centres' topic guidance.

The guidance outlines how local planning authorities should 'plan positively, to support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive, diverse places where people want to live, visit and work.'

The topic includes guidance on a number of matters relevant to town centres and retail, including:

- Parking
- The 'Town Centre First' approach
 - Sequential testing
 - Impact testing
- Strategic vision and local plans for town centres
- Addressing market signals (responsive policies to market changes and regular review of retail land allocations)
- Indicators for assessing the health of town centres
- Edge of centre and out of centre developments; and
- Planning considerations for tourism.

Strategic Vision and Local Plans

Includes guidance on what the plan should cover:

- What is the role, function and hierarchy of town centres in the area (USP of the town centre)
- Local planning authorities should work with the private sector, Portas Pilot organisations, town teams, neighbourhood planning groups, town centre management organisations and other relevant groups when developing such strategies
- The plan should include the vision for the future of the town centre
- Can the town centre accommodate the scale of assessed need for main town centre uses?
- Timeframe for new retail floorspace provision
- What complementary strategies are necessary/appropriate to enhance/help deliver vision for town centre's future?
- How can parking provision/cost be enhanced/balanced to encourage town centre vitality?

- Identify changes in the hierarchy of town centres, including where they are in decline; and
- Regularly review the strategy/local plan.

How Should Market Signals be Addressed when Planning for Town Centres?

Local planning authorities should consider relevant market signals when planning for town centres, regularly review retail land allocations, analyse impact from market signals on town centres, responsive policies to changing market/business needs.

Which Indicators Should be Used to Determine the Health of Town Centres?

The following indicators, and their changes over time, are relevant in assessing the health of town centres:

- diversity of uses
- proportion of vacant street level property
- commercial yields on non-domestic property
- customers' views and behaviour
- retailer representation and intentions to change representation
- commercial rents
- pedestrian flows
- accessibility
- perception of safety and occurrence of crime; and
- state of town centre environmental quality.

Not all successful town centre regeneration projects have been retail led or involved significant new development. Other solutions:

- Improvements to the public realm
- Transport (including parking) and accessibility; and
- Other measures promoted through partnership.

Sequential and Impact Testing

The NPPG has guidance on these tests and how to use them in decision making. The tests are used to determine whether it is feasible to accommodate developments within town centres, and if not what impact they would have on town centres.

These tests are specific to main town centre uses of which retail is the foremost use (full breakdown of uses can be found in NPPF Appendix 2 Glossary). Impact tests only apply to proposals exceeding 2,500 sqm gross of floorspace, unless a different locally appropriate threshold is set by the local planning authority.

Town Centre Indicators

A wealth of existing research has sought to assess town centre characteristics and performance using data, including:

- ***London Town Centre Health Check Analysis Report, Greater London Authority (2009)*** – this provided a ‘snapshot’ of the health of over 200 of London’s town centres using wide ranging strategic indicators (assessing scale and function; capacity; financial performance; accessibility; town centre initiatives; accidents and security; and environment) and illustrates how some of these have changed over time. The study is comprehensive in terms of the town centre indicators assessed whilst also providing thresholds for selected indicators against which the performance of centres can be assessed. However, the health check assesses trends within individual health check indicators as opposed to developing typologies of town centres within London.
- ***Town Centre Futures, Experian (2012)*** – the Experian study was developed following the Portas Review³² to assess potential drivers of town centre change, and how Town Teams might successfully respond to these changes. The study developed multi-functional definitions of the town centres, based upon town centre catchment areas. The study assessed indicators focusing upon demography, consumers, local economy, local resilience and technology usage to derive town centre resilience scores.

³² Portas (2011) The Portas Review An independent review into the future of our high streets. Department for Business, Innovation and Skills

- ***Understanding High Street Performance, Genecon LLP for Department for Business, Innovation and Skills (December 2011)*** – the report suggests four Key Performance Indicators (KPIs) which can be used by local authorities and partners to understand a high street's performance: footfall, consumer and business satisfaction, diversity and economic activity. The study did not implement the KPIs, but instead gave high-level suggestions for what indicators of performance should seek to measure.
- ***Help for London's Struggling Centres – A New Town Model, Bone Wells Urbecon (March 2012)*** – this report discusses recent national trends in town centres within the London context. It provides a wide literature review, discussing both the problems facing London's town centres and policies to alleviate them, before proposing a method to measure town centre performance, which uses the following indicators:
 - Catchment: a measure of the spending power available to the centre, proxied by shopper catchment areas, indices of deprivation and living costs
 - Competition: the extent that a town centre is subject to competition from other centres, measured by the house price-to-income ratio, retail vacancy rates and overlap of shopper catchment areas.
 - Choice: measured using a retail variety index and the wider arts, cultural and tourism offer.
 - Convenience: measured in terms of transport accessibility
 - Character: a measure of the quality of the environment, which would include crime rates and public realm quality
- ***Beyond the High Street, Centre for Cities (2013)*** – this study was developed in recognition that retail trends are just one component of high street performance. It therefore assessed the wider economic underperformance of city centres in terms of private sector job creation and how the spatial patterns of job creation is changing.
- ***Beyond Retail. Redefining the Shape and Purpose of Town Centres, Distressed Town Centre Property Taskforce (2013)*** – the Distressed Town Centre Property Taskforce was created in response to the key recommendations in the Portas Review to analyse retail property issues relating to town centres. The Taskforce developed a number of recommendations to redefine the shape and purpose of

town centres based upon interviews and a survey with town centre stakeholders. The report also assessed indicators of socio-economic and town centre performance at a national and regional level (e.g. population growth, high street vacancy rates) to understand the drivers of high street trends.

- **Successful town centres: developing effective strategies, gfirst and ATCM (2013)** – this study developed the KPIs suggested in the 2011 Genecon study into toolkits of indicators around:
 - People and footfall – including indicators of footfall; car parking; access; and community spirit
 - Diversity and vitality of place – including indicators assessing the variety of retail services in town centres; the number of events that attract more than 500 spectators in 24 hours; and number of reported incidents of crime
 - Consumer and business perceptions – including indicators of business confidence; satisfaction with the retail offer; and perception of crime and safety; and
 - Economic characteristics – including indicators assessing retail sales; evidence of partnership approaches to managing the town centre; changes in the number of charity shops; and evidence of active management of the evening and night time economy.

The report categorised town centres into:

- ‘Community focused entrepreneurs’ (social; local): town centres with a clear focus upon the needs of their local communities. They have high levels of independent retailers that provide a mix of products and services in conjunction with charity shops and discount stores
- ‘Sustainable destinations’ (social; global): town centres that are typically linked to a university and attract visitors from all parts of the UK, as well as overseas visitors. These town centres have a mix of independent retailers and global anchor retail brands
- ‘Specialists’ (economic; local): town centres with above average number of specialist retailers and geographical catchment areas. They also have a strong local character of their own; and

- 'Global celebrities' (economic; global): town or city centres that are dominated by global brands that act as a pull factor for attracting overseas visitors and nationals.

Appendix B Shortlisting of 50 Centres and Derivation of Indicators

Town Centre Sample Selection

To select a sample of 50 town centres for the first stage of the analysis, we used the Experian Goad database of town centres across England, excluding all out-of-town shopping centres and retail parks. Experian survey over 3,000 town centres across the UK and Ireland to provide details of the composition of each centre and the extent of retail uses, with premises split into 31 trade types and the retail space allocation across each of them. We wanted town centres only, and so removed from the dataset any entries that related to out-of-town retail parks and shopping centres.

The remaining 1,616 town centres were then sorted by region to establish the geographical spread of town centres across England. A table of the geographical distribution is given below. We have preserved this regional split in our sample of 50 centres.

Table B.1 Regional distribution of town centres in England

<i>Region</i>	<i>% of town centres (excluding retail parks and out-of-town)</i>
East Midlands	7
East of England	9
London	19
North East	5
North West	13
South East	17
South West	13
West Midlands	8
Yorkshire and Humber	8

To decide which centres to select from each region, we sorted the dataset by total gross floorspace, a measure which includes retail (Use Class A1 i.e. convenience, comparison and retail service), financial and business services (Use Classes A2 and B1) and leisure services (Use Classes A3, 4, 5 and D2). Based on the average town centre size for that region, a random selection process was used to identify a proportionate number of small, medium and large towns within each region. The size thresholds are as defined in **Table B.2** below, and were defined by GL Hearn based on professional judgement.

Table B.2 Centre Size Thresholds

Centre Category	Size	Floorspace (sqm): urban centre	Floorspace (sqm): rural centre
Small		< 50,000	< 30,000
Medium		50,000 to 150,000	30,000 to 100,000
Large		> 150,000	> 100,000

Full details of the region, floorspace, and number of units for each of the 50 centres is given at **Appendix C**

With our sample selected, we then gathered a large volume of ‘snapshot’ data for the 50 centres, drawing on previous studies’ recommended metrics as well as our own experience of analysing town centres. A full list of the data series gathered is provided at **Appendix D**. The data was sourced from two Experian databases: the Goad database, described above; and the retail spending database, which splits spending per capita into the main expenditure types (retail, food and drink, cultural, etc.) and is in turn derived from ONS Consumer Trends data. We also sourced income data directly from the ONS.

We identified the variables judged to be most useful for building a picture of the characteristics of the 50 town centres, taking into account the indicators recommended in the 2011 Genecon study and 2013 Gloucestershire LEP study, and our main objective of drawing out the implications for policy. We

then considered how they could be combined to produce a composite indicator of a given characteristic.

Town Centre Indicators

We have created four indicators for the purposes of this analysis. Below we describe each indicator, and summarise the rationale behind its design.

Performance

A town centre's performance is a difficult concept to define with data. For almost any potential indicator of success, an example can be found of a centre that is thriving in spite of its apparently poor performance against it.

To give an example, a thriving centre could be defined as a popular destination attracting high footfall, but a centre can be extremely successful at serving the local community without necessarily attracting a large number of people in absolute terms. Conversely, a location may attract a large number of visitors, but if the visitors are predominantly attracted by the night time economy, the result could be anti-social behaviour, crime, and an environment considered uninviting for the majority of local residents.

By the same token, one could assume diversity is an indicator of success, that is, a centre with a mix of cultural, retail and leisure activities on offer is by definition more successful than a centre offering just retail, but there are many examples of pure retail spaces – London's Oxford Street being a major one – that don't offer a diverse range of activities, but that would still be considered thriving.

Expenditure is another good example of a potentially misleading indicator. A centre can be successful even though it attracts only modest levels of spending, either because it tends to offer low-cost items demanded by the local catchment, or because it is dominated by cultural attractions rather than retail space.

For this reason, the performance indicator is intentionally kept simple, using only variables that can be expected to provide strong signals of the health of the centre, and separating possible (but not necessarily sufficient) conditions for success into distinct variables. The vacancy rate is included as a proxy for vibrancy, although a potential shortcoming of the indicator is that vacancy can on occasion be a side-effect of a process of redevelopment and regeneration of an area. The average size of vacant units is compared to the average unit size for the centre as a whole, making the assumption that if a centre's vacant

units are large relative to the average unit size, this is evidence of a lack of vibrancy and therefore under-performance.

In addition the proportion of total floorspace (both retail and leisure) devoted to charity shop retail is included as a proxy for dwindling demand for space within the centre on the part of businesses. Mirroring the approach to including vacancy, charity shop size is measured relative to overall average unit size within the centre. A large number of charity shops does not necessarily imply under-performance, but if those charity shops also tend to be the largest shops, it is an indication that businesses are not demanding larger units, and that charity shops are perhaps more dominant within an area than would be desirable.

The performance indicator is probably closest to the 'Economic Characteristics' indicator toolkit put forward in the 2013 Gloucestershire LEP study. That toolkit included indicators of retail sales, numbers of charity shops and vacant units, evidence of partnership working and of management of the night time economy. Retail sales data is included in other indicators, but is excluded from the performance indicator as retail sales are not a pure indicator of performance for the reasons described above. Also excluded from the performance indicator are the variables for partnership working and management of the night time economy, as that data would need to be collected on the ground.

It should be noted that the relative simplicity of the performance indicator, and its reliance on charity shop and vacant unit floorspace data in drawing conclusions about centre performance, implies an increased risk that town centres could be wrongly classified as under- or over-performing. More in-depth investigation of a smaller sample of centres conducted in Section 5.4 looks at trends in vacancy over time in order to identify where a centre has been misclassified.

Socio-economic Context

A centre's performance and function cannot be appreciated fully without taking account of the socio-economic context in which it sits. An affluent local community is more likely to spend money on leisure and cultural pursuits, as well as on higher-value retail spending, and although it is no guarantee of success, a centre positioned geographically to attract that spending has a better chance of thriving than a centre in a disadvantaged area where disposable income is minimal.

A range of variables is included in the indicator of socio-economic context. Long-term unemployment and sickness/disability benefit claimant rates are both included as indicators of the health of the local labour market. Spending on comparison (i.e. non-food) goods is included as a proxy for disposable income levels, since such expenditure tends to be increasing in income. The proportion of the population employed in managerial positions is included as an indicator of both income and education levels within the local population. Each of these four variables is available at three 'drivetime' catchment levels: 10-minute; 20-minute and 30-minute. We have selected the appropriate drivetime catchment for each centre using centre size thresholds, which can be found in **Table 4.1**.

Average disposable income data is also included in the indicator of socio-economic context, although it is provided at the NUTS3 level of regional detail, and is therefore a less precise indicator of the socio-economic characteristics of the immediate vicinity of the centre. To take this into account, it is assigned a lower weight in the analysis.

The socio-economic context indicator is not immediately analogous to any of the indicator toolkits developed in the 2013 Gloucestershire LEP study, since it does not directly relate to the characteristics of the town centre itself, but instead attempts to measure the economic vitality and labour market strength of the centre's vicinity. The purpose of creating the indicator for this study is to allow for these effects to be isolated in examining performance, since they are factors beyond town centre policy makers' control.

Size

As stated above, the size indicator is exogenous to town centre performance, meaning that in the short-term, the direction of causality goes one way: from size to performance³³. It also means that it is a 'natural endowment' over which policy makers have little control. The size indicator is created using measurements of physical space alone, and does not relate to the population or catchment of each centre.

Size is neither a necessary nor a sufficient condition for town centre success. There are numerous examples of small centres that are strong performers, such as Reading Caversham and Twickenham St Margarets, just as there are large centres that under-perform, such as Croydon. The value of including a

³³ Over the longer-term, a centre's performance may impact on its size (i.e. successful centres could be expected to expand), but we think that the short term is more relevant for policy decisions, since policy makers cannot exert a significant influence over the size of the centre in the short term.

size indicator is therefore in allowing us to account for the effects of size, and to focus on the elements of a town centre offer over which policy makers can exert an influence. The size of a centre will also be a key determinant of the range of policy measures available to the local authority or LEP.

Two variables have been used to create this indicator. Total floorspace measures the quantum of retail, leisure, and other commercial and public uses within a high street or town centre. The 'number of units' variable is a count of the outlets within the centre offering the above uses. Both variables are included to take account of and control for variability in average unit size.

Diversity

Much recent research has concluded that successful town centres require a mix of uses to attract and sustain footfall, and to provide opportunities for residents and visitors to spend time within town centres. One of the key findings from the Distressed Town Centre Property Taskforce³⁴ was that town centres have become too reliant upon retail and need to be rebalanced. A broader range of functions should therefore be offered including employment, commercial, leisure, community, residential, healthcare and education, in order to ensure that town centres serve a variety of needs, and are in use both during the day and the evening.

A further aspect of high street diversity is the mix of independent and chain store (or 'multiple') retailers present on a high street. Independent retailers are commonly considered to offer goods and services that are tailored to the demands of the local population, reduce the extent to which a high street feels 'cloned', and help to increase the proportion of high street spending that is retained by locally-owned businesses.

Independent retailers provide a wide-ranging retail offer, and it is not necessarily the case that independent stores are more prevalent the more successful or affluent the high street. In more affluent areas they tend to offer high-end clothing and goods for the home, including antiques, whilst convenience stores such as grocers, butchers and hardware retailers tend to dominate the independent offer in less affluent areas.

The indicator of diversity measures two aspects of diversity: spending on selected products and services (comparison goods, convenience goods, cultural activities, restaurants and cafés, alcohol consumed outside the home,

³⁴ Distressed Town Centre Property Taskforce (2013) Beyond Retail. Redefining the Shape and Purpose of Town Centres.

and takeaways) as a proportion of total spending within a town centre, and the proportion of independent retailers on the high street. In considering leisure uses within the mix of spending the potential for a retail bias is avoided, and the centre is assessed according to a broader range of potential uses.

One shortcoming of the diversity indicator to note is that diversity is measured purely in terms of spending rather than footfall, that is, the significance of cultural and leisure activities for a centre is measured in terms of the amount spent on them, rather than the number of people visiting the town centre in order to enjoy them. The potential for this to impact on the indicator has been mitigated to an extent by considering the proportion of spending on retail versus cultural and leisure activities *relative to the English average* for that type of spending, meaning a centre will get a higher diversity score the more of the types of expenditure constitute an above-average proportion of total spend. A further point is that the indicator does not capture the wider diversity of some centres where civic, leisure and office/employment uses make a contribution to the overall experience of a town, due to the data limitations. Town centres are about more than just retail and quasi-retail service facilities. For example, employment and civic functions are motivators of visits, and contribute daytime population and spend. Additionally, environmental quality makes a contribution to a successful town centre, with attractive centres with a high-quality public realm tending to be places where people are happy to spend time.

The four indicators are summarised in **Table B.3** below.

Table B.3 Indicators of Town Centre Characteristics

Indicator	Variables	Weight of each variable in the indicator
Performance	Percentage of charity shop floorspace (inverted)	0.25
	Average charity unit size relative to average unit size for centre (inverted) ³⁵	0.25
	Percentage of vacant shop floorspace (inverted)	0.25
	Average vacant unit size relative to average unit size for centre (inverted)	0.25
Socio-economic Context	% of working age population employed in higher managerial, administrative and professional occupations	0.1
	% of working age population long-term unemployed (inverted)	0.25
	% of population economically inactive through long-term sickness or disability (inverted)	0.25
	Average gross disposable household income (GDHI) of local population	0.1
	% of spending on comparison goods	0.3
Size	Total floorspace	0.5
	Number of units	0.5
Diversity	Spending diversity index	0.5
	Independent floorspace as a percentage of the total	0.5

All data was standardised in order to allow the data to be combined in a meaningful way. We have centred the data on the English average for the indicator, in order for the categorisation of a given town centre relative to the

³⁵ Note that for three centres: Twickenham St Margarets; Goring-by-Sea and Haworth, no charity shop floorspace was recorded. This means that the relative size of charity shops variable was not applicable in these cases. We have therefore removed it from the calculation and weighted the remaining three indicators equally.

average to be independent of the sample of town centres being examined. For a detailed technical methodology, please refer to **Appendix E** Methodology.

We have indicated where a variable would need to be inverted in order to be combined into a composite indicator (with the general rule that a higher value for the indicator suggests a positive characteristic).

All indicators are composites of more than one variable. We decided how to weight the variables using professional judgement about the strength of the signal the variable offered in respect of the characteristic being measured. For example, for the socio-economic data, we judged that spending on comparison goods (non-food items), along with the unemployment and long-term benefit recipient data for the catchment area, provided the strongest signal of the strength of the local economy, while the average income variable was perhaps a weaker indicator of local economic health, given that it was based on the local authority area rather than the catchment.

Where we did not have a strong prior belief about the relative strength of the signals from the variables (for example, in the case of the Performance, Size and Diversity indicators), we attributed equal weights.

The indicators all offer a different perspective on the issue of town centre performance. Some measure characteristics that are relevant context for policy makers, but that do not necessarily imply a given performance outcome, such as the size indicator (i.e. both large and small centres can under- or over-perform). Others can be characterised as *drivers* of success and are essentially exogenous (at least in the short term), such as the socio-economic context. We summarise these characteristics more formally in **Table B.4** below.

Table B.4 Characteristics of the Indicators

Indicator	Exogenous	Driver of Performance	Indicator of Performance
Performance			✓
Socio-economic Context	✓	✓	
Size	✓		
Diversity		✓	

Appendix C Long List of 50 Centres

own centre	Region	Number of outlets	Total Floorspace (sq ft)
Amesbury	South West	109	227,600
Ashburton	South West	99	98,400
Baldock	East of England	135	359,500
Barking	London	324	858,500
Bath	South West	1,007	2,273,500
Beckenham	London	256	578,800
Berwick-upon-Tweed	North East	275	559,300
Birtley - Durham Road	North East	90	144,200
Bristol - Crow Lane	South West	26	52,300
Brixton	London	501	1,040,800
Carnforth	North West	103	204,100
Croydon	London	1,115	3,573,000
Dewsbury	Yorkshire and Humber	344	588,800
Edenbridge	South East	91	123,200
Frome	South West	271	366,400
Goring-by-Sea	South East	49	71,600
Harrogate	Yorkshire and Humber	606	1,563,900
Haworth	Yorkshire and Humber	46	42,000
Hebden Bridge	Yorkshire and Humber	192	223,600
Horsham	South East	419	1,176,400
Hounslow	London	396	1,610,700
Kirkby	North West	135	501,100
Lancaster	North West	587	1,294,700
Leeds - Central	Yorkshire and Humber	1,368	4,189,900
Lewes	South East	350	691,500
Liverpool - Central	North West	1,094	4,037,100
New Addington	London	60	145,000
Newton Aycliffe	North East	121	465,200
Northampton - Kingsthorpe	East Midlands	68	139,700
Nottingham - Hyson Green	East Midlands	200	311,900
Oakham	East Midlands	264	496,800
Oxford	South East	482	1,699,900
Rainham	South East	159	276,700
Reading - Caversham	South East	131	251,400
Saffron Walden	East of England	247	376,800
Shipston-on-Stour	West Midlands	95	127,500
Skelmersdale	North West	199	556,000
Southend-on-Sea	East of England	559	1,827,500
Stanmore	London	99	211,200
Stourport-on-Severn	West Midlands	184	323,700
Swindon	South West	574	1,723,500
Tamworth	West Midlands	333	705,600
Thetford	East of England	194	384,500
Tolworth	London	174	341,200
Twickenham - St Margarets	London	65	63,700
Walthamstow	London	596	1,189,700
Wellingborough	East Midlands	403	1,055,000
Wokingham	South East	258	560,000
Wolverhampton	West Midlands	818	2,415,100
Wombwell	Yorkshire and Humber	154	247,200

Appendix D Variables

Approximately 200 variables have been considered and analysed as part of developing the approach described in this note. The headline variables are presented below, with the full data set including sub sets of these variables.

Variable	Definition
Total floorspace	<p>A measure of the space in active use for commercial, cultural or public services uses. Total floorspace includes the following categories:</p> <ul style="list-style-type: none"> Retail (comparison and convenience goods) Retail services (e.g. opticians, post offices and hairdressers) Leisure services (e.g. bars and restaurants, cinemas, theatres, sports facilities and hotels) Business services (e.g. building societies, legal services) Public services (e.g. museums, art galleries, government and municipal buildings) Health and medical services Religious services Transport services Offices Vacant
Total units	The number of units used for one of the activities described within the total floorspace variable above
Total charity shop floorspace	Floorspace which is currently occupied for charity shop uses
Total charity shop units	The number of units currently occupied for charity shop uses
Total vacant floorspace	Floorspace previously used for one of the activities described within the total floorspace variable but which is not currently in active use.
Total vacant units	The number of units previously used for one of the activities described within the total floorspace variable but which is not currently in active use

Variable	Definition
Economic activity (including status) of the working age population	All usual residents within the catchment area aged 16 to 74 that are currently employed or self-employed, unemployed or full-time students.
Higher managerial, administrative and professional employment	All usual residents within the catchment area aged 16 to 74 who are employed in a higher managerial, administrative and professional (C1) category job. Derived from the National Statistics Socio-economic Classification (NS SeC), which in turn is derived from ONS Standard Occupational Classification data (SOC 2010)
Working age population	All usual residents within the catchment area aged 16 to 74
Unemployment	All usual residents within the catchment area aged 16 to 74 who are currently unemployed and seeking employment.
Long term sick or disabled population	All usual residents within the catchment area aged 16 to 74 who are currently economically inactive due to long term sickness or disability.
Total comparison goods expenditure per person (by catchment area)	The total expenditure on comparison goods within the catchment area divided by the usual resident population.
Total convenience goods expenditure per person (by catchment area)	The total expenditure on convenience goods within the catchment area divided by the usual resident population.
Gross disposable household income	The total disposable household income within the region divided by the usual resident population.
Total retail spending per person	The total expenditure on both comparison and convenience goods within the catchment area divided by the usual resident population.
Total leisure spending per person	The total expenditure on leisure goods and services within the catchment area divided by the usual resident population.
Cultural services spending per person	The total expenditure on cultural services within the catchment area divided by the usual resident population.

Variable	Definition
Restaurant and café meals spending per person	The total expenditure on restaurant and café meals within the catchment area divided by the usual resident population.
Alcoholic drinks away from home spending per person	The total expenditure on alcoholic drinks away from the home within the catchment area divided by the usual resident population.
Take away meals eaten at home spending per person	The total expenditure on take away meals eaten at home within the catchment area divided by the usual resident population.
Total floorspace occupied by multiples	Floorspace used for one of the activities described within the total floorspace variable which is occupied by a non-independent
Propensity to shop	An estimate of the propensity of all usual residents within the catchment area to shop at a given centre.

Appendix E Methodology

We have described our method in detail for the performance indicator – for those variables where the process is very similar, we have summarised the procedure without providing additional formulas.

Performance indicator

Data series

The data series used to create the performance indicator are listed below. For detailed definitions, refer to **Appendix D** Variables.

- Total floorspace
- Total units
- Total charity shop floorspace
- Total charity shop units
- Total vacant floorspace
- Total vacant units

Derivation of variables

Prevalence of charity shop space:

$$Prevalence_{CS,i} = \frac{Floorspace_{CS,i}}{Floorspace_{T,i}} \times 100$$

where:

$Prevalence_{CS,i}$ is the prevalence of charity shop floorspace within centre i

$Floorspace_{CS,i}$ is the total quantum of charity shop floorspace within centre i

$Floorspace_{T,i}$ is the total floorspace within centre i

Prevalence of vacant space:

$$Prevalence_{VAC,i} = \frac{Floorspace_{VAC,i}}{Floorspace_{T,i}} \times 100$$

where:

$Prevalence_{VAC,i}$ is the prevalence of vacant floorspace within centre i

$Floorspace_{VAC,i}$ is the total quantum of vacant floorspace within centre i

Relative size of charity shops:

$$RelSize_{CS,i} = \frac{AverageSize_{CS,i}}{AverageSize_{T,i}} \times 100$$

where:

$RelSize_{CS,i}$ is the relative size of charity shops in centre i

$AverageSize_{CS,i}$ is the average size of a charity shop unit in centre i

$AverageSize_{T,i}$ is the average size of a unit in centre i , across all uses, calculated as total floorspace divided by total units for each centre

Relative size of vacant units

$$RelSize_{VAC,i} = \frac{AverageSize_{VAC,i}}{AverageSize_{T,i}} \times 100$$

where:

$RelSize_{VAC,i}$ is the relative size of vacant units in centre i

$AverageSize_{VAC,i}$ is the average size of vacant units in centre i

Creation of indicator

The four variables that go into the performance indicator are standardised to allow them to be combined into one indicator. An example of a standardisation formula for the charity shop prevalence variable is given below:

$$SPrevalence_{CS,i} = \frac{Prevalence_{CS,i} - \overline{Prevalence_{CS}}}{SD(Prevalence_{CS})}$$

where:

$SPrevalence_{CS,i}$ is the value of the standardised charity shop prevalence indicator for town centre i

$\overline{Prevalence_{CS}}$ is the mean value of the charity shop prevalence variable

$SD(Prevalence_{CS})$ is the standard deviation of the charity shop prevalence variable

Both the mean and the standard deviation can be derived either from the sample of town centres being analysed, or from the population, that is, the Goad database of all town centres across England. Where the mean and standard deviation for all town centres across England is available, we have used them to create a standardised value of the variable that is independent of the sample chosen for analysis. Where the population data are not available, we have used the sample mean and standard deviation. The means and standard deviations we have used for the performance indicator variables are given in Table C.0.1.

Table C.0.1 Standardisation of performance variables

<i>Variable</i>	<i>Mean (sample/population)</i>	<i>Standard deviation (sample/population)</i>
Prevalence of charity shop space	Population	Population
Prevalence of vacant floorspace	Population	Population
Relative size of charity shops	Sample	Sample
Relative size of vacant units	Sample	Sample

The final step is to create the performance indicator, by taking a weighted average of the four standardised variables. We have chosen to give all variables equal weight in the indicator, as per the following formula:

$$\begin{aligned}
 \text{Performance}_i &= \frac{1}{4} (S\text{Prevalence}_{CS,i} + S\text{Prevalence}_{VAC,i} + S\text{RelSize}_{CS,i} \\
 &\quad + S\text{RelSize}_{VAC,i})
 \end{aligned}$$

where:

Performance_i is the performance indicator for town centre i

$S\text{Prevalence}_{CS,i}$ is the standardised charity shop prevalence variable for centre i

$S\text{Prevalence}_{VAC,i}$ is the standardised vacant space prevalence variable for centre i

$S\text{RelSize}_{CS,i}$ is the standardised relative size of charity shops variable for centre i

$RSize_{VAC,i}$ is the standardised relative size of vacant units variable for centre i

Local economic context indicator

Data series

The data series used to create the performance indicator are as follows:

- Economic activity (including status) of the working age population
- Working age population (all usual residents aged 16 to 74)
- Higher managerial, administrative and professional employment
- Unemployment
- Long term sick or disabled population
- Total comparison goods expenditure per person (by catchment area)
- Total convenience goods expenditure per person (by catchment area)
- Gross disposable household income

Derivation of variables

% of working age population employed in higher managerial, administrative and professional occupations:

$$EmpRate_{M,i} = \frac{Employment_{M,i}}{Population_{WA,i}} \times 100$$

where:

$Prevalence_{M,i}$ is the percentage of the population employed in higher managerial, administrative and professional occupations within centre i

$Employment_{M,i}$ is the total number of individuals employed in higher managerial, administrative and professional occupations in centre i

$Population_{WA,i}$ is the total working age population within centre i

Unemployment rate:

$$U_i = \frac{Unempl_i}{Population_{WA,i}} \times 100$$

where:

U_i is the unemployment rate in centre i

$Unempl_i$ is the total number of unemployed individuals in centre i

$Population_{WA,i}$ is the total working age population within centre i

Inactivity rate through long-term sickness or disability:

$$Inactive_i = \frac{SickDsb_i}{Population_{WA,i}} \times 100$$

where:

$Inactive_i$ is the inactivity rate through sickness or disability in centre i

$SickDsb_i$ is the total number of economically-inactive individuals long term sickness or disability in centre i

$Population_{WA,i}$ is the total working age population within centre i

% of retail spending on comparison goods:

$$RetailSpendRate_{COM,i} = \frac{Spend_{COM,i}}{(Spend_{COM,i} + Spend_{CON,i})} \times 100$$

$RetailSpendRate_{COM,i}$ is comparison goods expenditure as a % of all retail expenditure, per head of population, within centre i

$Spend_{COM,i}$ is the average expenditure per person on comparison goods within centre i

$Spend_{CON,i}$ is the average expenditure per person on convenience goods within centre i

Creation of indicator

The five variables that go into the local economic context indicator are standardised to allow them to be combined into one indicator. Due to data

limitations, all means and standard deviations used are taken from the sample, rather than the population.

To create the local economic context indicator we take a weighted average of the five standardised variables. The unemployment and economic inactivity variables have been inverted for consistency with the other variables, i.e. so that a higher value for the indicator corresponds to a better socio-economic context.

Size Indicator

Data series

The data series used to create the performance indicator are as follows:

- Total floorspace
- Total units

Creation of Indicator

The two variables that go into the size indicator are standardised to allow them to be combined into one indicator. An example of a standardisation formula for the total floorspace variable is given below:

$$SFloorspace_i = \frac{Floorspace_{T,i} - \overline{Floorspace_T}}{SD(Floorspace_T)}$$

where:

$SFloorspace_i$ is the value of the standardised total floorspace indicator for town centre i

$Floorspace_{T,i}$ is the total floorspace within centre i

$\overline{Floorspace_T}$ is the mean value of the floorspace variable

$SD(Floorspace_T)$ is the standard deviation of the floorspace variable

We have used the population means and standard deviations in creating the two standardised variables.

To create the size indicator, we have taken a simple average of the two standardised variables, with both variables having equal weight in the indicator.

$$Size_i = \frac{1}{2} (SFloorspace_{T,i} + SOutlets_{T,i})$$

where:

$Size_i$ is the performance indicator for town centre i

$SOutlets_{T,i}$ is the standardised number of units variable for centre i

Diversity indicator

Data series

The data series used to create the diversity indicator are as follows:

- Total retail spending per person
- Total leisure spending per person
- Total comparison goods expenditure per person (by catchment area)
- Total convenience goods expenditure per person (by catchment area)
- Cultural services spending per person
- Restaurant and café meals spending per person
- Alcoholic drinks away from home spending per person
- Take away meals eaten at home spending per person
- Total floorspace occupied by multiples

Derivation of variables

Two variables go into the diversity indicator: a spending diversity index, and the proportion of floorspace occupied by multiples.

The spending diversity index takes expenditure by type, expressed as a percentage of all high street expenditure, and compares it with the English average to see whether the centre attracts an above-average level of spending on a given activity.

The six types of expenditure are: comparison goods; convenience goods; cultural services; restaurant and café meals, alcoholic drinks away from the

home; and takeaway meals. The formulas for deriving spending as a percentage of all high street spending are given below:

Comparison goods expenditure as a % of all high street expenditure:

$$AllSpendRate_{COM,i} = \frac{Spend_{COM,i}}{AllSpend_i} \times 100$$

where:

$AllSpendRate_{COM,i}$ is expenditure on comparison goods as a % of total high street expenditure, made up of total retail and leisure spending, per head of population within centre i

$Spend_{COM,i}$ is the average expenditure per person on comparison goods within centre i

$AllSpend_i$ is total high street expenditure per person within centre i

Convenience goods expenditure as a % of all high street expenditure:

$$AllSpendRate_{CON,i} = \frac{Spend_{CON,i}}{AllSpend_i} \times 100$$

where:

$AllSpendRate_{CON,i}$ is convenience goods expenditure as a % of all high street expenditure, per head of population, within centre i

$Spend_{CON,i}$ is the average expenditure per person on convenience goods within centre i

$AllSpend_i$ is as defined above

Cultural services expenditure as a % of all high street expenditure:

$$AllSpendRate_{CUL,i} = \frac{Spend_{CUL,i}}{AllSpend_i} \times 100$$

where:

$AllSpendRate_{CUL,i}$ is expenditure on cultural services as a % of total high street expenditure, per head of population, within centre i

$Spend_{CUL,i}$ is the average expenditure per person on cultural services within centre i

$AllSpend_i$ is as defined above

Restaurant and café meals expenditure as a % of all high street expenditure:

$$AllSpendRate_{RES,i} = \frac{Spend_{RES,i}}{AllSpend_i} \times 100$$

where:

$AllSpendRate_{RES,i}$ is expenditure on restaurant and café meals as a % of total high street expenditure, per head of population, within centre i

$Spend_{RES,i}$ is the average expenditure per person on restaurant and café meals within centre i

$AllSpend_i$ is as defined above

Expenditure on alcoholic drinks away from the home as a % of all high street expenditure:

$$AllSpendRate_{ALC,i} = \frac{Spend_{ALC,i}}{AllSpend_i} \times 100$$

where:

$AllSpendRate_{ALC,i}$ is expenditure on alcoholic drinks away from the home as a % of total high street expenditure, per head of population, within centre i

$Spend_{ALC,i}$ is the average expenditure per person on alcoholic drinks within centre i

$AllSpend_i$ is as defined above

Expenditure on takeaway meals as a % of all high street expenditure:

$$AllSpendRate_{TA,i} = \frac{Spend_{TA,i}}{AllSpend_i} \times 100$$

where:

$AllSpendRate_{TA,i}$ is expenditure on takeaway meals as a % of total high street expenditure, per head of population, within centre i

$Spend_{TA,i}$ is average expenditure per person on takeaway meals within centre i

$AllSpend_i$ is as defined above

To create the spending diversity indicator, the six variables described above are standardised using the population (i.e. English) mean and sample standard deviation for each series. A value above zero therefore indicates that the type of expenditure in question is above the English average (in proportionate terms); a negative value indicates that the type of spending constitutes a below-average proportion of total expenditure.

To create the spending diversity index, we assign each type of expenditure a value of zero or 1. If the type of expenditure is a below-average proportion of total spend, we assign it a value of zero. If expenditure is above-average, we assign it a value of 1. Taking spending on comparison goods as an example:

$$Score_{COM,i} = \begin{cases} 1 & \text{if } AllSpendRate_{COM,i} > \overline{AllSpendRate_{COM}} \\ 0 & \text{otherwise} \end{cases}$$

where:

$\overline{AllSpendRate_{COM}}$ is the mean expenditure on comparison goods as a % of total high street expenditure, per head of population, across centres in England

$Score_{COM,i}$ is the score for comparison goods expenditure for centre i

The spending diversity index is then the sum of the six scores:

$$SDI_i = Score_{COM,i} + Score_{CON,i} + Score_{CUL,i} + Score_{RES,i} + Score_{ALC,i} + Score_{TA,i}$$

Prevalence of multiple retailer floorspace:

$$Prevalence_{MUL,i} = \frac{Floorspace_{MUL,i}}{Floorspace_{T,i}} \times 100$$

where:

$Prevalence_{MUL,i}$ is the prevalence of multiple retailers within centre i

$Floorspace_{MUL,i}$ is the total floorspace occupied by multiple retailers within centre i

$Floorspace_{T,i}$ is the total floorspace within centre i

Creation of indicator

To create the diversity indicator, both variables – the spending diversity index and the prevalence of multiple floorspace – are standardised.

The spending diversity index is standardised using an assumed average score of 3, and the sample standard deviation. The prevalence of multiple retailer floorspace is standardised against the population mean and standard deviations. Both variables are given equal weight in the indicator.

Catchment indicator

Data series

The data series used to create the catchment indicator are as follows:

- Total floorspace;
- Total retail expenditure per person; and
- Propensity to shop in the local area (i.e. the proportion of total expenditure spent within the town centre of interest).

Derivation of variables

Market share-based turnover of convenience goods:

$$Turnover_{CON,i} = Spend_{RET,i} \times Propensity_{CON,i}$$

where:

$Turnover_{CON,i}$ is the market share-based turnover for convenience goods of centre i

$Spend_{RET,i}$ is the total retail spending per person for centre i

$Propensity_{CON,i}$ is the propensity to shop for convenience goods at centre i

Market share-based turnover of comparison goods:

$$Turnover_{COM,i} = Spend_{RET,i} \times Propensity_{COM,i}$$

where:

$Turnover_{COM,i}$ is the market share-based turnover for comparison goods of centre i

$Spend_{RET,i}$ is as defined above

$Propensity_{COM,i}$ is the propensity to shop for comparison goods at centre i

Trading density of convenience goods:

$$Density_{CON,i} = \frac{Turnover_{CON,i}}{Floorspace_{CON,i}}$$

where:

$Density_{CON,i}$ is the trading density of convenience goods floorspace expressed in £/sqm within centre i

$Turnover_{CON,i}$ is the market share-based turnover of centre of convenience goods for centre i

$Floorspace_{CON,i}$ is the total floorspace devoted to convenience goods in centre i

Trading density of comparison goods:

$$Density_{COM,i} = \frac{Turnover_{COM,i}}{Floorspace_{COM,i}}$$

where:

$Density_{COM,i}$ is the trading density of comparison goods floorspace expressed in £/sqm within centre i

$Turnover_{COM,i}$ is the market share-based turnover of centre of comparison goods for centre i

$Floorspace_{COM,i}$ is the total floorspace devoted to comparison goods in centre i

Creation of indicators

In order to produce two standardised indicators of catchment size, one for convenience goods and one for comparison goods, we have standardised each centre's trading density measure for both comparison goods and convenience goods. The means and standard deviations we have used to create the two catchment indicators are given in

Table C.0.2.

Table C.0.2 Standardisation of catchment variables

<i>Variable</i>	<i>Mean (sample/population)</i>	<i>Standard deviation (sample/population)</i>
Trading density: convenience	Population	Sample
Trading density: comparison	Population	Sample

The indicator for convenience goods catchment is then defined as follows:

$$Catchment_{CON,i} = \frac{Density_{CON,i} - \overline{Density_{CON}}}{SD(Density_{CON})}$$

where:

$Catchment_{CON,i}$ is the catchment indicator for convenience goods for centre i

$Density_{CON,i}$ is the trading density of convenience goods floorspace expressed in £/sqm within centre i

$\overline{Density_{CON}}$ is the average trading density of convenience goods floorspace measure across centres in England.

$SD(Density_{CON})$ is the standard deviation of the trading density of convenience goods floorspace indicator

Appendix F List of Consultees

<i>Organisation</i>	<i>Consultee</i>	<i>Role</i>	<i>Case study area</i>
Croydon Council	Simon Bashford	Planning Policy and business liaison	Croydon
	Lisa McCance	Economic Development	
Croydon BID	Mathew Sims	Chief Executive, Croydon BID	Croydon
Croydon Chamber of Commerce	Annabel Fogden	Manager, Croydon Chamber of Commerce	Croydon
Horsham District Council	Garry Mortimer-Cook	Horsham Town Centre Manager	Horsham Billingshurst
	Barbara Childs	Head of Planning Policy	
South Downs National Park	Tim Richings	Head of Planning Policy	Petworth Billingshurst
Lewes District Council	Kevin Kingston	Economic Development	Lewes
	Edward Sheath	Planning Policy	
Kirklees Council	Andy Jackson	Investment and Regeneration Service	Dewsbury
Kirklees Council	John Buddle	Planning - Town Centres	Dewsbury
Mid Yorkshire Chamber of	Steven Leigh	Head of Policy and	Dewsbury

<i>Organisation</i>	<i>Consultee</i>	<i>Role</i>	<i>Case study area</i>
Commerce		Representation	
Barnsley Council	Robert Ellis	Planning Policy Team	Wombwell
Barnsley Council	Richard Wraith	Councillor	Wombwell
Hebden Royd Town Council	Jason Boom	Town Clerk	Hebden Bridge
Hebden Bridge Partnership	Bob Deacon	Treasurer	Hebden Bridge
Harrogate Borough Council	Matthew Roberts	Economic Development Unit Officer	Harrogate
Harrogate Borough Council	Rachael Hutton	Planning Officer	Harrogate
Harrogate Chamber of Commerce	Brian Dunsby	Chief Executive	Harrogate
Town Centre Focus Group	Workshop with seven local businesses, mix of multiples and independents		Harrogate
Leeds City Council	Phil Crabtree	Head of Planning	Leeds
Leeds City Council	Steve Speak	Deputy Head of Planning, Strategy and Policy	Leeds
Leeds City Council	Adam Harvan	Planning Officer Retail Specialist	Leeds
Leeds City Council	John Ebo	Head of City Centre	Leeds

<i>Organisation</i>	<i>Consultee</i>	<i>Role</i>	<i>Case study area</i>
		Management	
Leeds City Council	Simon Brereton	Economic Policy Manager	Leeds
Leeds City Region Local Enterprise Partnership	Nigel Guy	Head of Economic Research & Intelligence	Leeds City Region

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