

Title:

The Town Centre shaped by the past, trapped in the present, threatened by the Future.

What does the Future hold for the Town Centre?

Abstract

This research investigates the factors that effect town centres, past, future and present. The topic explores drivers and barriers to change and the opportunities provided through initiatives. Case studies are discussed, and recommendations provided.

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Justification

This research paper concludes, the study period for an MSc in International innovation Management.

The Topic was chosen because the author has endured a 30 year plus, career history working as a Retail Area Manager and has experienced many changes through that period, good times and bad economically.

Retail from the perspective of a commercial organisation is noticeably different, than it is for many entrepreneurs.

A retail corporation with all of their divisions and internal support, works through substantial business plans and budgets, that support the end result of bottom-line profit and management of instore employees expands and compresses, based on management accounts. Stores images are managed to a brand standard and initiatives change to support growth trends, such as the growth of coffee or food services.

Through the years the author, has witnessed a significant change in the High Street, the development of Out of Town retail and the growth of online shopping. Having been brought up in York and for many years working across the country before becoming settled in North Wales. The authors learnings have previously all been through application, learning strategies for business management through, experience. This experience enabled the author to manage a significant number of stores, operating as the most profitable area in his region for a number of years.

This experience has taken the author forwards, now working in Business Wales as an advisor specializing in the support of start-up and growth business phases, much of the work involved, supports the development of robust cashflows and business plans for further development, to gain funding. On occasion the work requires supporting businesses through liquidation.

In the majority the author is supporting SMEs with 1-9 employees, who don't have the support of divisions and big budgets, this means these entrepreneurs, have to look after their businesses differently and through thinking creatively, they are bound by short term leases in many cases and are building their businesses in the Town centres of North Wales.

An interesting facet of the authors work is the support of underserved communities, who seek to build businesses in the UK, to rebuild their lives after, losing their homes in their own country.

The author works primarily in North Wales and many of the entrepreneurs, he supports, seek to start a business in the empty and affordable properties in Rhyl. A town currently undergoing regeneration, once again.

With a broad history and experience, for comparison the author considers this topic to be relevant to his past, present and future and will consider from a theoretical approach, reviewing literature for insight and consider:

How Towns Centres originated; how they have changed over time; what barriers and factors impact upon them and make reference to, two local towns that are very different: Llandudno and Rhyl.

He will also consider What the Future Holds in a world where consumerism is moving increasingly online.

Declaration of Competing Interest:

The author recognizes he may have a biased opinion, from both his past and current experiences. In the majority the author will refer to literature and reflect upon these for comment.

The author will draw on both the literature and experience in his conclusion.

Scope and Limitations:

The research will include National and some European literature. The case study will be localized to the authors familiar area: Rhyl and Llandudno. Literature will be referenced throughout.

Methodology:

There has been a significant amount of Government and expert research conducted regarding town centres. The majority relates to town size and Highstreet decline. The challenge of the research is that all towns are different in their makeup and complexity.

There is not a significant amount of consistent quantitative data regarding town centres in the UK, as not all local authorities consistently survey their towns. The author is therefore dependent on Government data and statistics, previous research and qualitative data.

The Town Centre shaped by the past, trapped in the present, threatened by the future.

What does the Future hold?

Chapter 1.0 Introduction

The Town Centre has been the commercial, political, and social heart of settlements for many years, always changing and developing as society, behaviors, and innovation slowly encourage its evolution.

The term Town Centre means different things to different people. For many the world over they are a place to meet up, to shop or trade, to work, to live, to go for help and support, to exchange ideas or be entertained.

There have been numerous reports and academic papers debating the “Future of the High Street” Much of the specifics of these numerous reports are drawn on in a piece of research that sets out to ‘ Measuring the Impact of Out-of-town Retail Development on Town Centre Retail Property in England and Wales’ by Thurstain and Goodwin: Through reading this report in depth it is possible to draw out some key studies and interesting points that have been raised over time.

National Economic Development Office Distributive Trades Economic Committee 1988.

Understanding High Street Performance, a report prepared by GENECON LLP and Partners, iv. 302 G. Astbury, M. Thurstain-Goodwin Department of the Environment Urban and Economic Development Group 1994; 1998; Urban Task Force 1998; Portas 2011; Grimsey 2011. (Thurstain-Goodwin, 2014)

These reports all reinforce the importance of our town centres for economic and civic life, whilst attempting to balance market economic forces, guide the regeneration process and the protection of investment in these central places. Some people say the time of the town centre is past, but what of the people who still see its relevance.

How is it possible to measure the importance and impact of Town Centre, when all Towns and Town Centres are different. For example, two seaside towns, coastal resorts can behave and perform differently. Much of this may be to ownership of property, the surrounding communities, the construct of development and even the people who visit it.

Rhyl and Llandudno in North Wales are specific examples of this and will be discussed in more detail later in the paper.

According to Astbury and Thurstain-Goodwin, Measuring the Impact of Out-of-town Retail Development on Town Centre Retail Property in England and Wales Gaynor Astbury & Mark Thurstain-Goodwin states “A key facet of town centre vitality and function lies in retail, and one of

the major trends over the last 30 years has been the decentralization of retail development to out-of-town locations.” (Thurstain-Goodwin, 2014)

The contribution of Out of Town developments was the beginning of the end for some Town Centres. One of the main assets of Out-of-Town retail is large free car parks, an enticing prospect to the shopper without restriction and without the threat of a parking fine, encouraging a leisurely pursuit of shopping.

“The first off-center grocery supermarket development in West Bridgeford, Nottingham in 1964 marked the start of a new era of decentralised development and by 1987 there were 39 national proposals at over 50,000 sq ft (National Economic Development Office 1988). (Thurstain-Goodwin, 2014)

Contained within the report there is discussion that shows how decentralization has been challenged:

‘Despite more strategic policy attempts to curb decentralization there has been a consistent increase in large off-center retail development with new retail and leisure park schemes rising 34 % between 2001 and 2012 (Trevor Wood Associates 2003–2012) and supermarkets growing in the UK in number by 35 % between 2001 and 2011 (Department for Business Innovation and Skills 2011)’. (Thurstain-Goodwin, 2014)

There is much quantitative study regarding an awareness of the impact created by retail parks, but a lack of empirical evidence cited. Which to a degree is supported by the fact that all Town Centres are different and difficult to pigeon hole.

‘In 1992 the Department for the Environment carried out an extensive literature review to assess the impact of development at that time. Of their vast synthesis of research, they reflected on the approaches taken to assess impact from elaborate spatial modelling of the 1960s to the detailed individual impact studies of the 1970s to the recognition of a lack of any detailed evidence in large-food impact throughout the 1980s’. (Thurstain-Goodwin, 2014) This illustrates the diverse depth of study and interest in the subject.

‘In 1994 a government review ‘Vital and Viable Town Centres’ (Department of the Environment Urban and Economic Development Group 1994), has shifted the stance of government to a desire for wanting vibrant, viable and busy town centres, thus forming a resistance to a revolution that was already well underway’. (Thurstain-Goodwin, 2014)

Again this shows the desire by groups to not let down centres simply disappear, like many species that just simply become extinct.

‘A key assessment of the early 1990s by the National Retail Planning Forum used employment levels as a proxy impact measure in the catchment areas of 93 new superstores, concluding an overall negative effect and net loss of employment within 15 km (National Retail Planning Forum 1998)’. (Thurstain-Goodwin, 2014)

‘A 1998 government investigation into large food store impact noted that 20 % of Local Authorities had not carried out a large retail impact assessment (Department of the Environment Transport and the Regions 1998), and the lack of empirical evidence meant a lack of conclusive evidence. A response and recent update to this study from the University of Southampton based on survey data of 8 centres, noted the positive local trader attitudes to new edge-of-centre developments and the perceived effect on local residents, revealing a highly polarized debate based on poorly digested ‘factoids’ of negative impact (Wrigley et al. 2010).’” (Thurstain-Goodwin, 2014)

When considering this evidence it suggests Local Authorities, in 1998 did not consider the impact to be significant enough to complete and assessment.

Chapter 2.0 Literature Review

Measurement and Typology of Towns

ONS Study

A mix of commercial retail and office space, administration, residential and a social hub the main components of Town Centre create a complex eco system, each one with a different mix creating its own individual DNA. They all have their own different geographical features and constraints, historical features plus different neighboring settlements, which can either add or subtract factors that have an effect on the mix of economic and social use of towns.

But when it comes to definitions and theory there is a fine line, dividing the terms Town Centre, High Street, City Centre and Urban area.

Due to these Town Centre unique characteristics, it is difficult to categorize and compare them in one truly accurate method, this means there are numerous methods for measuring Towns and Urban spaces.

There are numerous attempts to classify Town Typology including:

In the UK the ONS (Office for National Statistics) use population density to determine town size, but the level of detail they can access from the 2021 Population Census offers extra detail including: Demographics through Employment, Income, and Residential data – all of which help develop a better understanding of the makeup of a population centre. (ONS, 2021)

According to data collated from the 2021 census by the ONS presented as “Understanding towns in England and Wales, with a focus on population and demographic analysis” there are 1,186 towns including 91 large towns with a population above 75,000, 347 medium-sized towns with a population between 20,000 and 75,000, and 748 small towns with a population between 5,000 and 20,000. (ONS, 2021)

Chart: 01 Illustrating urban settlements identified as Towns in the UK

Table 1: Urban settlements used in the towns analysis, England and Wales

	Size (population Census 2011)	Counts	% of all towns
Small	5000 – 20 000	748	63
Medium	20 000 – 75 000	347	29
Large	75 000 – 225 000	91	8

Source: Census 2011

(ons.gov.uk, 2019)

A closer analysis of the same data found that the ONS states in ‘2019, nearly 33 million people lived in towns in England and Wales. Medium sized towns were the most populous towns with over 13 million residents. Larger towns had over 11 million residents and smaller towns over 8 million’.

(ons.gov.uk, 2019)

High Street Task Force Report

According to the High Streets task Force Report Town Personality Types (2013) identified with a view to help stakeholders identify effective strategies. (High Street Task Force, 2021)

A. Community-focused entrepreneurs

- Clear focus on needs of diverse local community
- Local community may have a more modest expendable income.
- Typically, a high number of independent traders, and good community spirit

Examples include Deptford, Brick Lane and Coleford (High Street Task Force, 2021)

B. Sustainable destinations

- May be linked to a university with an international reputation.
- Have the power to attract people from across the UK and Internationally
- Increasingly mindful of strategic sustainability issues

Examples include York, Cheltenham, and Oxford. (High Street Task Force, 2021)

C. Specialists

- Known for retail sophistication and specialist independent retailers.
- Tend to have a strong local character.
- Often not seen as international tourism destinations.

Examples include Padstow, Norwich, and Skipton. (High Street Task Force, 2021)

D. Global celebrities

- Globally recognised centres.
- Big retail brands are key anchors.
- Ability to attract visitors nationally and internationally.

Examples include Oxford Street (London), Princess Street (Edinburgh), and Liverpool City Centre. (High Street Task Force, 2021)

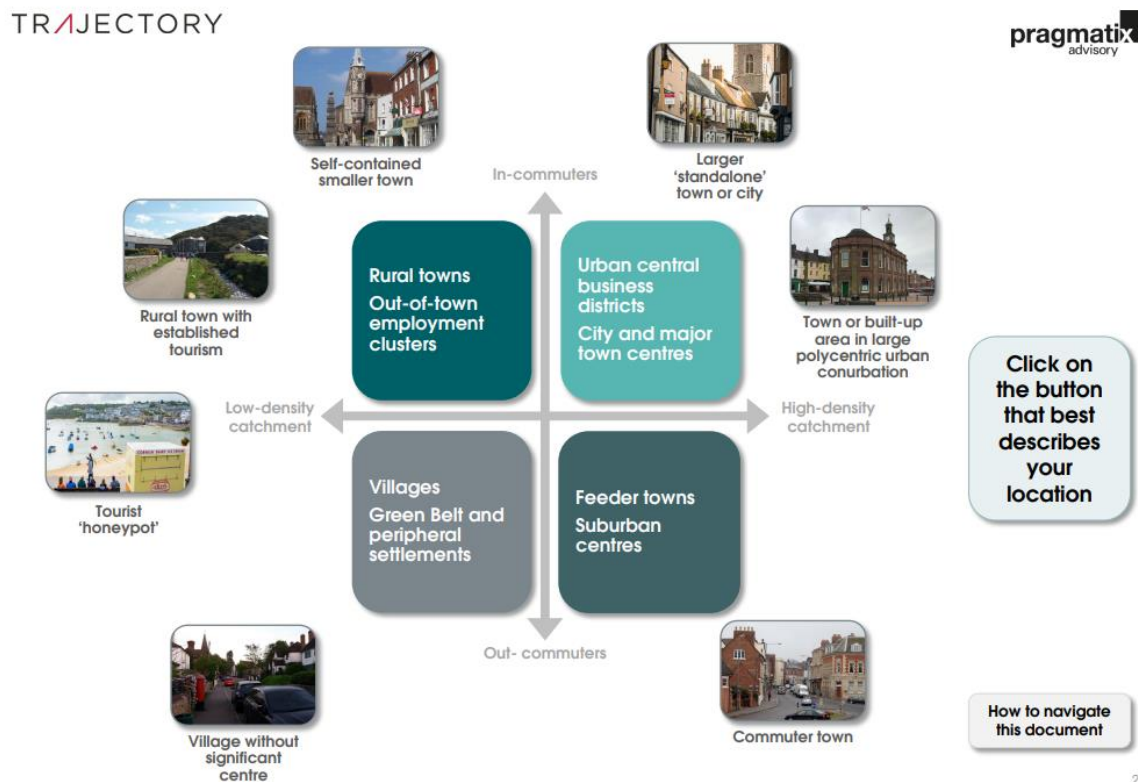
These four examples illustrate the diverse characteristics of towns.

But the Local Government Association have a different classification of town types.

Local Government Association

The Local Government Association have a different classification system, but with a larger selection of types. Using Axis based on Commuters and Catchment areas identifies High Street types as part of a Toolkit for Local Councils, progressing onto focusing on key issues experienced by type.

Chart: 02 Local Government Association



(Local Government Association, 2021)

Mumford

However, in 2021 Mumford et al offered an alternative definition and classification with a view to taking measurement away from retail occupancy by using activity patterns and footfall. The chart below is a simple illustration of the type and characteristics.

Chart: 03 Key location characteristics

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EPB: Urban Analytics and City Science 48(6)

Table 1. Key locational characteristics of the four town types.

Classifications	Typical characteristics
Comparison	People come here predominantly to shop Busiest in the run up to Christmas People travel a considerable distance to visit Wide range of retail choice, leisure, food and beverage Strong retail anchor(s) Strong presence of multiples and international brands Depth and breadth of merchandising Large catchment area Accessible by choice of means of transport Organise themselves to compete with other comparison towns and channels
Holiday	People come here for holiday or a 'day out' Busiest times are July and August – and days when the weather is good People travel a considerable distance to visit Focus on offering a good experience to visitors during the summer peak Attractive to tourists but have relatively weak comparison offer Organise themselves to increase and enhance their entertainment and leisure appeal
Speciality	People come here for the overall experience Footfall rises steadily from Easter to end of August – and peaks again around Christmas time People stay longer here (increased dwell time) Anchor(s) not retail – offer something unique and special Attract visitors but serve local population Organise themselves to protect and promote identity and positioning
Multifunctional	People come for a mixture of everyday needs Large multifunctional towns have higher footfall volumes than small multifunctional towns People travel further to visit the large multifunctional towns whilst the smaller ones just serve their local population. The retail offer, opening times, events, services and other uses are focused on the local community in smaller multifunctional towns. They are visited often and have convenience anchors, work, public transport shopping, markets etc. They organise themselves to be reliable community hubs. Larger multifunctional towns may drive regional economies, or are important centres serving a well-defined hinterland. They have anchors like professional services or financial centres, universities, major transport hubs etc. They are nationally and sometimes internationally connected. They should organise themselves to support their network of surrounding towns.

(Mumford, 2021)

This appears to be a more relevant measure for the purpose of understanding whether Town centres are viable.

The Social Market Foundation (SMF)

The Social Market Foundation (SMF) published a report Let's talk about Towns – Building a better understanding of Town vitality.

The report concentrates on towns stating 'Smaller and less populous than major cities, these places often fall by the wayside in policy discourse – particularly when it comes to conversations about the economy'. (Scott Corffe, 2022)

Despite efforts from policymakers in recent years to harness the power of towns, their potential remains an issue that needs to be addressed. This analysis presented in the chart below – which leverages proprietary Visa payments data alongside ONS census data. Illustrating that there is significant untapped potential in our towns which could be unlocked with the right policy focus. This would not only benefit local businesses and people, but also the economic growth of the whole country. Possibly supporting a much need boost to GDP.

Chart 04: SMF 6 Town types

Town type and % of all UK towns in category	Description	Typical examples	Noteworthy geographical concentrations of town type
Vibrant towns (14%)	Towns scoring above average on skills, infrastructure and the business environment.	Watford, Sutton Coldfield, Livingston	Often near major cities The “London-Gatwick-Brighton corridor”
Opportunity towns (21%)	Often nice places to live (for example, as measured by resident wellbeing) and sometimes relatively affluent, but scoring below-average on skill levels, infrastructure and business environment.	Ramsgate, Clacton-on-Sea and Scarborough Merthyr Tydfil Peterhead	Coastal towns Places that have struggled from de-industrialisation, such as ex-mining communities.
Backbone towns (20%)	Places scoring above average on infrastructure or business environment (but not both), suggesting strengths to build on. These places are below-average on skill levels.	Sittingbourne, Hastings, Wellingborough, Blaydon-on-Tyne	Southern coastal towns South Wales Towns near Liverpool and Newcastle
Foundation towns (11%)	Towns that perform well on infrastructure and business environment but fall short on skills levels.	The “New Towns” of Harlow, Stevenage and Basildon Ashford, Kent	Towns around Birmingham, Manchester and Leeds. “New Towns” The “Thames Gateway” (estuary towns in Kent and Essex)
Heartland towns (21%)	Towns with above-average skills levels but below-average infrastructure quality.	Buckingham, Brackley, Banbury	More rural parts of England and Wales, the East coast of Scotland, Northern Ireland
Gateway towns (14%)	Towns with above-average skills levels and infrastructure, but a below-average local business environment	Oxted, Caterham, Rickmansworth, Harrogate	“Commuter belt” towns near major cities such as London, Edinburgh, Manchester and Leeds

Source: SMF analysis

(Scott Corffe, 2022)

All of the above modelling, reports and view point offer a modern perspective, however it is possible to look into history, to consider how towns came to be for context and relevance to their purpose.

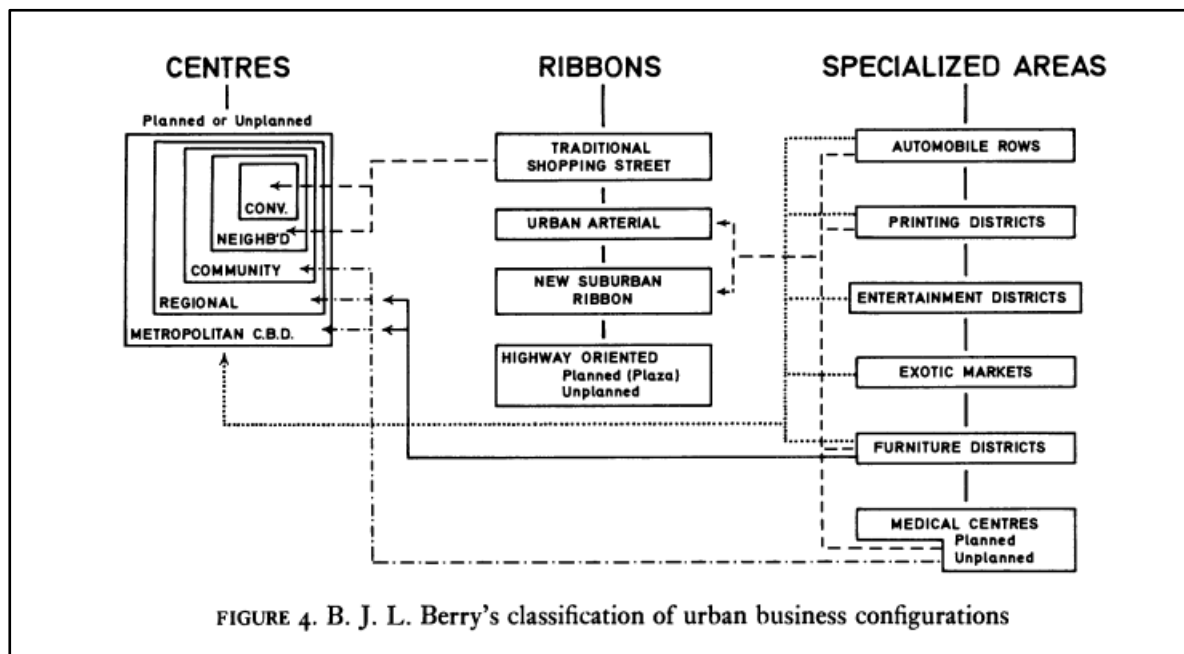
History – Settlement Theory (Appendix A)

Looking back at literature on Settlement theory research shows that in 1959 B.J.L Berry adapted previous spatial theories modelling settlement hierarchy to develop a hierarchy of retail centres.

According to an article written by R.L. Davies published by the Royal Geographical Society in 1972 “The strongest analogy ever drawn between settlement characteristics and retail provisions concerns the concept of hierarchy advanced in Berry's theory of tertiary activity (Berry, Garrison et al., 1959). (Society, 1972)

The precise form of this analogy is that hamlets in the settlement hierarchy are matched by isolated clusters of stores in the city; villages are equated in functional role with neighborhood shopping centres; towns have their equivalent in community shopping centres; cities are represented by regional shopping centres; and the metropolitan area is approximated in status by the central business district. This hierarchical structure of shopping centres has mainly been verified in the American context, but the hierarchy as a conceptual model has been repeatedly applied in British and European studies and has often, consciously or otherwise, been utilized as a framework to control the planning of urban shopping centres.

Chart 05: BJL Berry’s classification of urban business configuration



(Society, 1972)

Having reviewed the broad spectrum of literature and views on town types it is possible to begin to consider literature about the factors that drive change in the Town Centre

3.0 Drivers of Change

There are numerous factors that have driven change in Town Centres, a complex web of interconnected developments through continuous innovation, unfortunately most of these developments have contributed to an erosion to the importance and patronage of the Town Centre

3.1 Digital technology

Digital technology has introduced the dawning of the new age of online shopping. The majority of consumers now have internet connectivity, in fact it is that prevalent that lack of access to the internet is now included as a measure of poverty by the Joseph Rowntree Foundation. (Joseph Rowntree Foundation, 2021)

In 2010 an article published in the International Journal of Retail & Distribution Management, written by Doherty, Neil F. and Ellis-Chadwick, Fiona stated:

“There was much speculation that on-line retailing would have a massive impact on, and might even eventually replace, the high street. (Doherty, 2010)

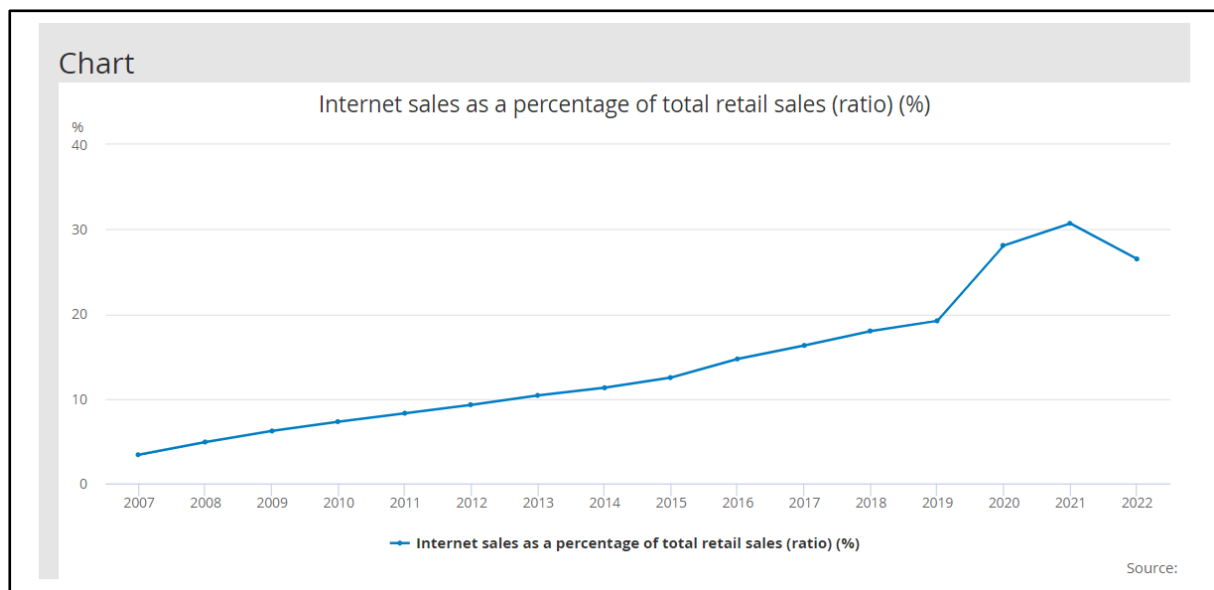
‘This perception was based upon the early mood of unbridled optimism about the Internet’s potential, coupled with the positive predictions about the growth of Internet sales’ (Doherty, 2010)

This predicted that the High Street would come under threat for three reasons – The demise of the middleman, ‘the virtual merchant’ (Doherty, 2010) and a new breed of middleman plus retailers, that were cannibalizing their own custom.

The growth in online sales has been exponential. Data from the ONS Retail Sales Index illustrates:

That chart below illustrates online retail sales in the UK have risen steadily over the last 15 years from 2.8% share of total retail sales in Q1 of 2007 to 28% in Q1 in 2022 (16% of the increase occurred during the covid pandemic) as shown in the chart below. (ONS.gov.uk, 2023)

Chart 06: Internet sales as a percentage of total retail sales



(ONS.gov.uk, 2023)

It can be observed from the above chart a peak in online shopping occurred during the Covid pandemic lockdown.

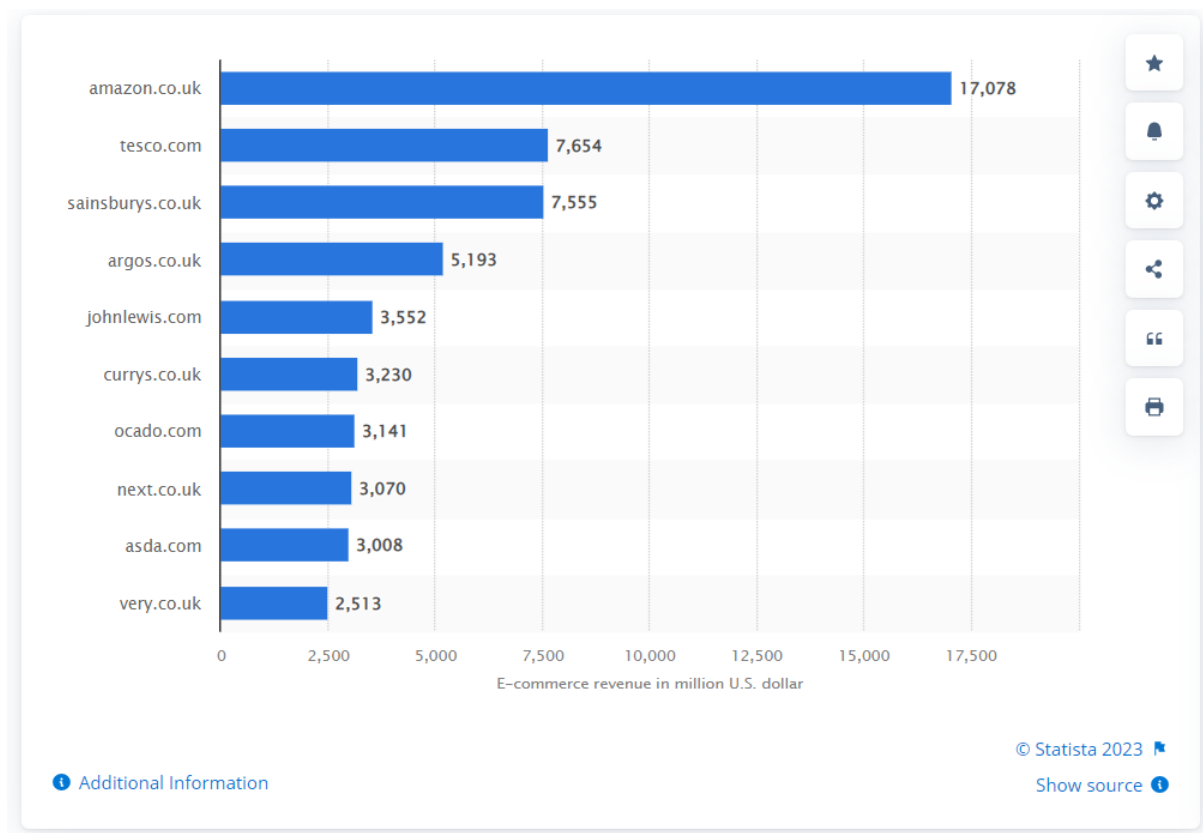
3.2 Competition and adaption

Competition and the side effects of adapting existing business models is as a direct result of the online shopping evolution.

As Online shopping developed, traditional bricks and mortar retailers were facing competition from new business models without a High Street presence e.g., Amazon, Ocado and Very. This prompted established retailers to start their own online operations to adapting to changing customer demands and competing with the new online retailers, however any successes developing new online sales also had the knock-on effect of cannibalizing a growing proportion their own High Street sales.

The chart below illustrates an ironic situation where 7 out of the top 10 online retailers in the UK are established bricks and mortar retailers and they have created a position where they are losing sales from their established town centre operations to their newer online presence.

Chart 07: Top online stores in the UK in 2021, by e-commerce net sales



(Statista, 2023)

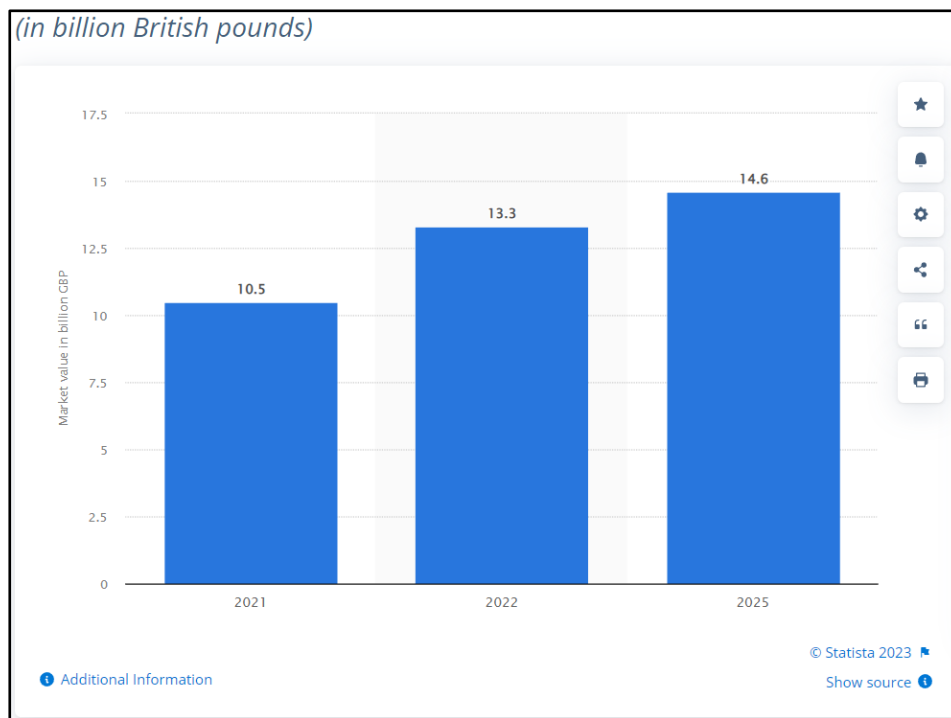
Just like retail, traditionally food consumption through cafes, restaurants and take aways have always been patronized by consumers on site in the High Street, but online sales growth has also created changes to this aspect of the Town Centre.

3.3 Changes to eating habits.

Initially with advent of the internet and latterly exploding with the development of the mobile phone app technology there has been an increase in the value of hot cooked meals delivered, directly to the consumers doorstep, for consumption in the comfort of their own home (examples include Just Eat, Uber Eats and Deliveroo)

As illustrated in the chart below the UK home delivered food marketplace grew 75% in 5 years from 2014 to 2019 and is expected to be worth £14.6 Billion in 2025 (ahdb, 2020)

Chart 08: Market value of foodservice delivery in the (UK) in 2021, plus forecasts.

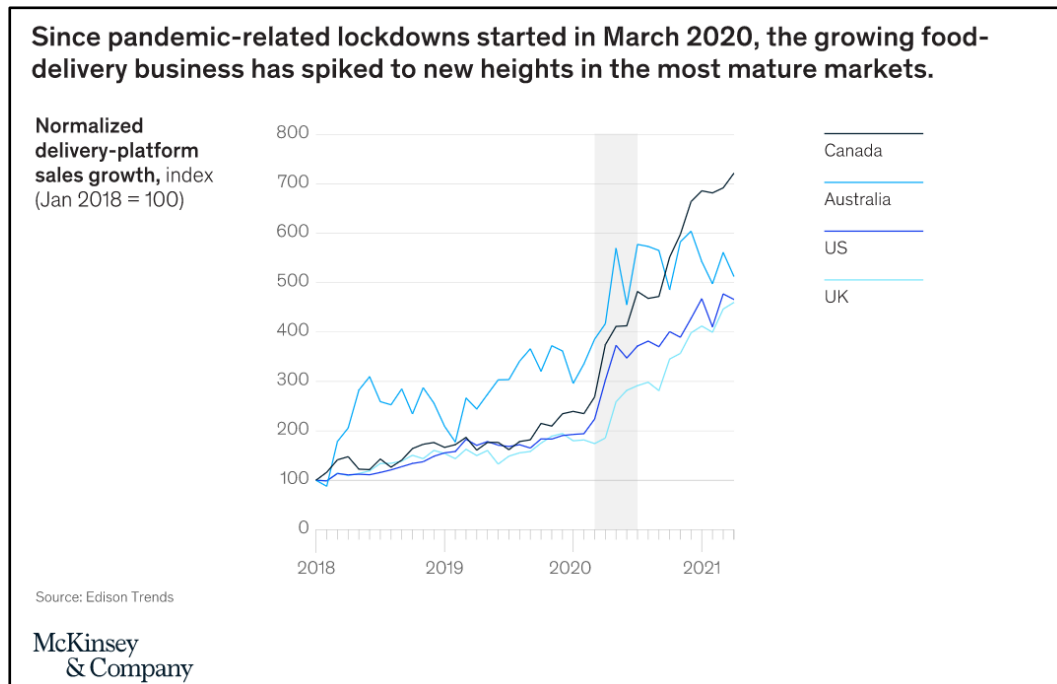


(Statista, 2021)

This suggests that consumer behaviours are changing to online food shopping. Which will have been exacerbated, by the Covid pandemic, with even elderly customers moving to online delivery, through fears about their health when shopping. This may not have previously been a consideration, as the elderly tend to be slower to engage with online services.

The chart below illustrates the meteoric rise in the food delivery business across key English speaking economies

Chart 09: Comparison of growth trajectory of food delivery business over the last 4 yrs.



(McKinsey, 2021)

3.4 Change in working habits.

Technology has given workers the freedom to move away from the traditional office building. As a result of the Covid Pandemic, working from home has become an acceptable working practice. ONS survey data shows that during Spring 2022 38% of working adults had spent at least one day working from home the previous week – pre pandemic surveys indicated this figure was 12.5%

Homeworking and Hybrid working have influenced consumer spending patterns.

The ONS have identified these types of workers are saving on transport and purchasing locally consumed goods in Town Centres. (ONS, 2022)

Consumer activity (numbers and spend) in Town Centres is monitored via the Pret Index - The ONS use big data from Google mobility, Bank card transactions and sales information from Pret A Manger. (ONS, 2022)

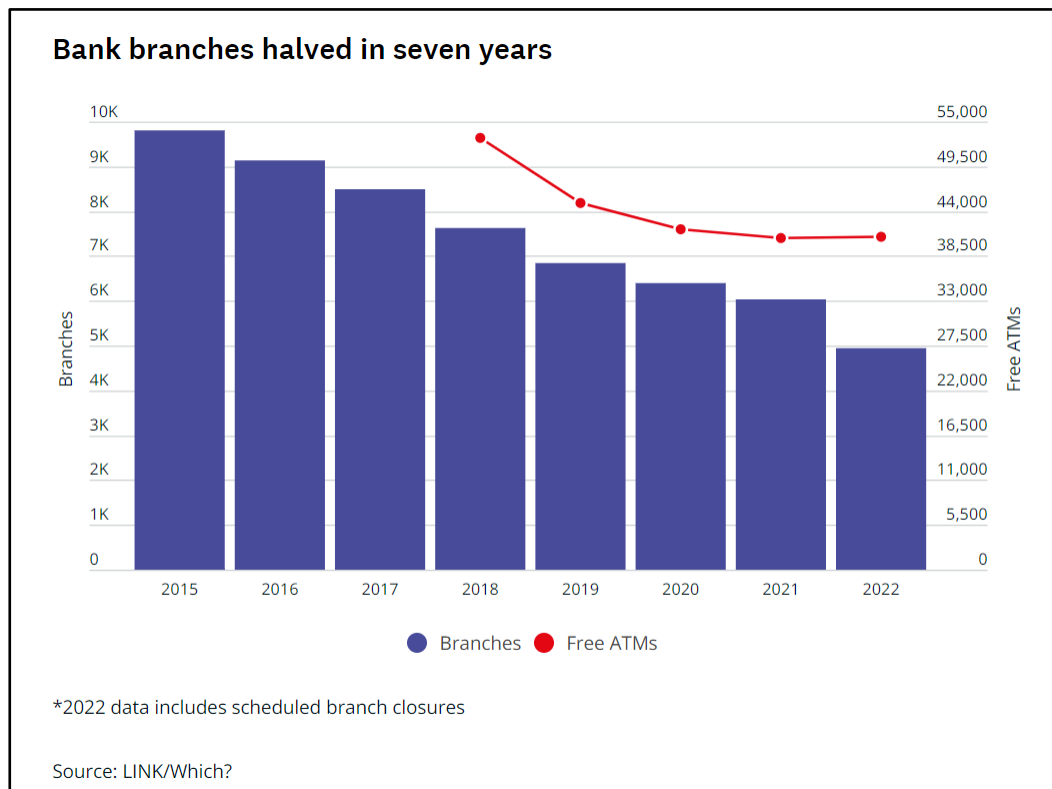
This information shows numbers and spend have not returned to pre pandemic levels in town centres.

Another traditional town centre business sector declining is banking in High Street branches.

3.5 Changing Banking Habits

The development of online and app-based banking has grown from 27% user base in 2004 to a projected usage in 93% of adults, resulting in the startling reduction of physical bricks and mortar banks by almost 50% in the last 7 years.

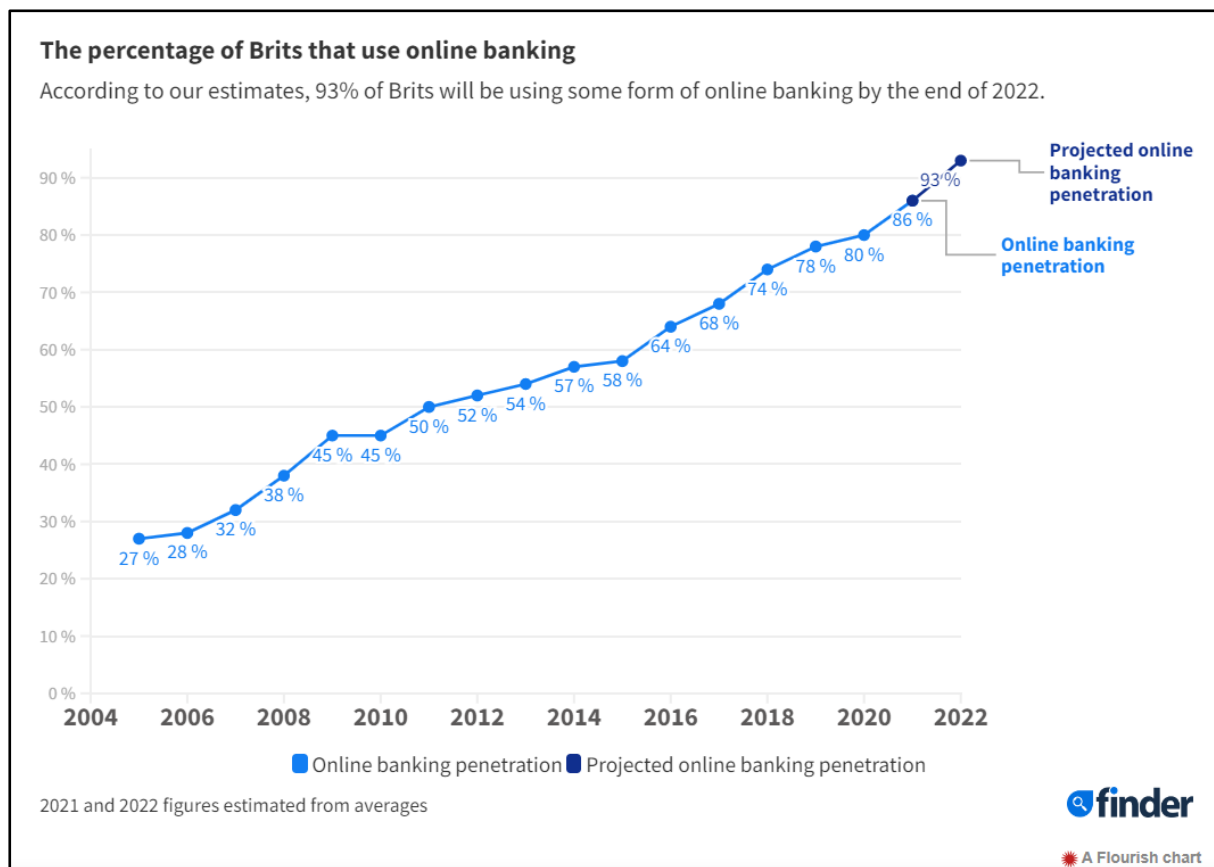
Chart 10: Bank Branch & ATM closures since 2015



(Which, 2022)

This chart illustrates the rapid pace of High Street Bank closures with nearly 500 Branches closing this equates to 50% of branches closing in seven years. Additionally, it shows the nation's progress to a cashless society as the number of free to use ATM's falls by 20% in five years – a drop of nearly one quarter.

Chart 11: Online Banking usage 2004 to 2022



(Finder, 2023)

The data in the chart above illustrates the growth in online banking from 27% penetration in 2005, initially via internet banking and latterly through app based banking, with 2022 predicted to have a 93% online banking usage. (Finder, 2023)

Conversely this means that only 7% of the population will not be using online banking. The rapid uptake of online banking over the last 10 years makes it difficult to identify a significant increase during the pandemic.

Chart 12: Internet Banking, By Age Group, Great Britain, 2019

(ONS, 2019)

The first Out of Town Shopping Centre was designed by architect Victor Gruen and opened in 1965 in Southdale Minneapolis (USA) offering customers a more convenient shopping experience, including: (Direct, 2017)

- Ease of Development – Developers were not restricted by the constraints of building in an existing environment, land was cheaper in brown and greenfield sites. (Robertson, 2007)

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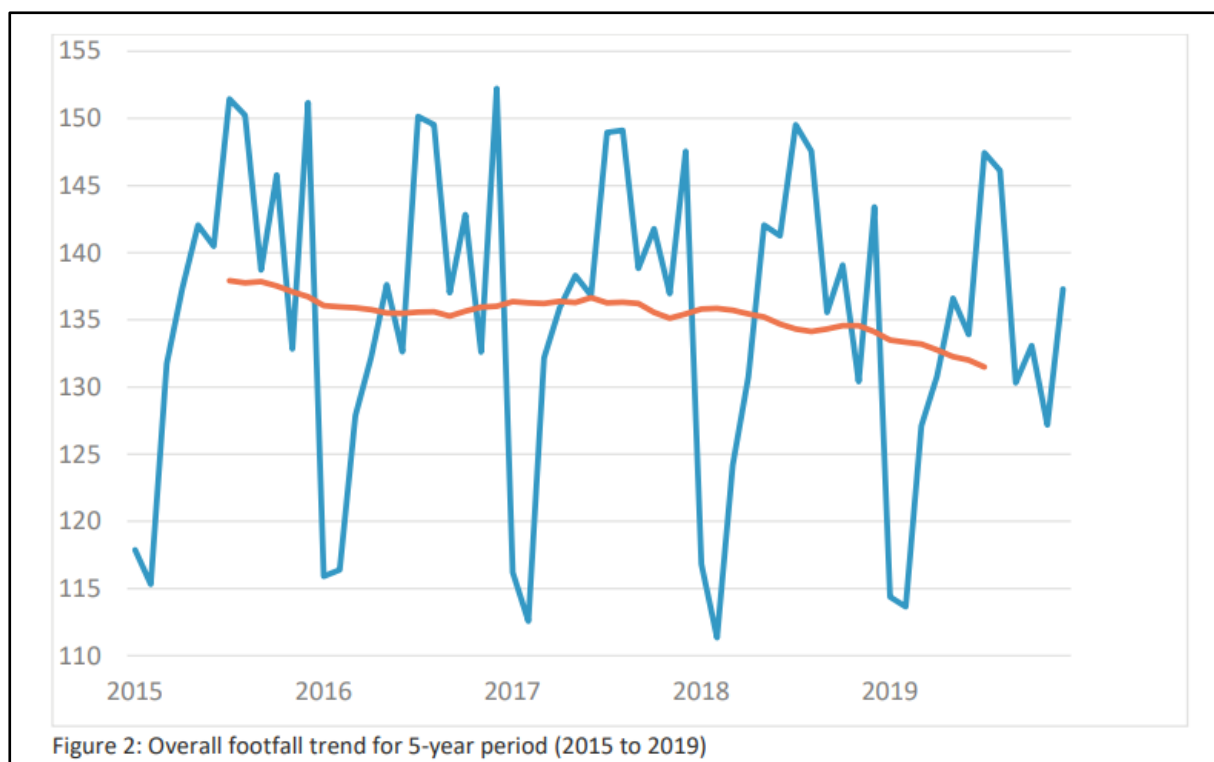
parking. Entertainment and more eating options are being added to increase the appeal of out-of-town centres. (Robertson, 2007)

3.7 Declining Footfall

The number of people visiting town centres is in decline.

The chart below illustrates the number of people shopping in UK High Streets – each year follows the same trend with peaks in Summer and Christmas and a massive fall slowly rebuilding after Christmas, however each year the peak gets lower– evidence from High Street Task Force suggests that pre pandemic footfall in town centres was in consistent decline with 5% between 2015 and 2019.

Chart 13: High Street Footfall Review



(Hstfmedia, 2020)

The number of people working in town centres is also in decline for numerous reasons – the reduction in the number of retail outlets combined with business failures has impacted on employment – in 2020 109,407 people lost their jobs through retail insolvencies. (Retail Research, 2023)

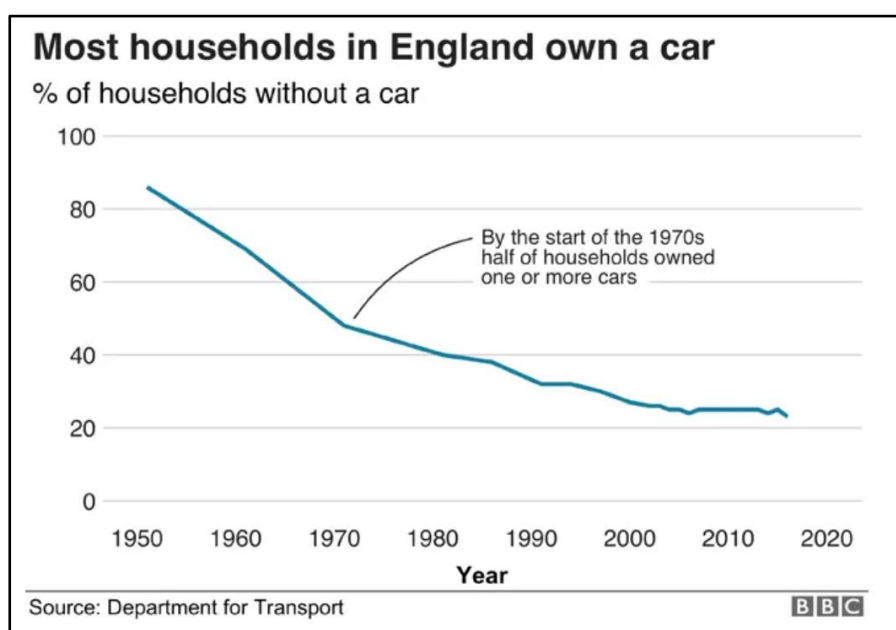
As stated previously the ONS published data indicating that 38% of the workforce had worked from home at least one day a week during the spring of 2022 – again impacting on footfall. (ONS, 2022)

The current cost of living crisis will potentially impact upon this further, particularly as the UK is on the cusp of a recession.

3.8 Car Ownership

Freedom of movement brought about through car ownership has increased dramatically according to a BBC report using Department of Transport information as shown in the chart below – in 1950 only 15% of households owned a car by 2017 this figure was 80%. Incidentally the number of households with two cars has doubled between 1980 and 2017 to over 30%. (BBC, 2017)

Chart 14: Households without a Car



(BBC, 2017)

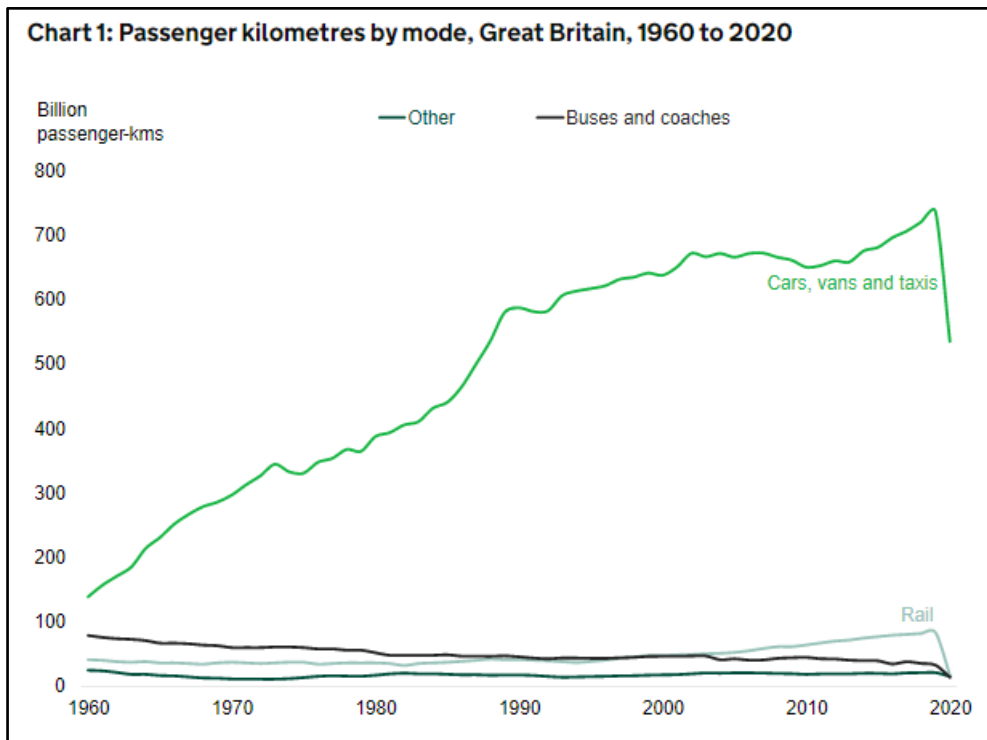
More parking is required – very few Town Centres were originally designed with the car in mind they have had to adapt around the original development – building parking capacity. Current guidelines encourage a positive parking agenda which may offer scope for future improvements to car users in the Town Centre. (Local Government Association, 2018)

Increased car ownership has given people the freedom and ability to travel where and when they want without having to rely on public transport with prescribed routes and timetables.

Decline in Public Transport is linked with the increase in car ownership, lower urban density and rising operating costs. (Government Office for Science, 2018)

As detailed in the chart below the rise increase in journeys using cars is not replicated by the use of public transport.

Chart:15 Passenger kms by mode, GB, 1960 - 2020



(Government Office for Science, 2018)

Parking charges have always been a contentious issue to all stakeholders in Town Centres – councils use parking charges as alternative income whilst Traders see charges as a barrier to trade.

The Welsh Government conducted an assessment of parking charges on Town Centre footfall in 2015, which gave very neutral recommendations, suggesting councils should collect more data, engage with stakeholders when making changes, plus The Welsh Government will need to work with Local Authorities to develop parking strategies that factor in local nuances in town centre layout and retail offerings which differ between locations, For example, in some areas strategies will need to focus more on parking availability or cost, while in other areas it will be more important to focus on promoting the retail offer in town centres vs. the out-of-town offer. (Gov.uk, 2018)

3.9 Empty Properties

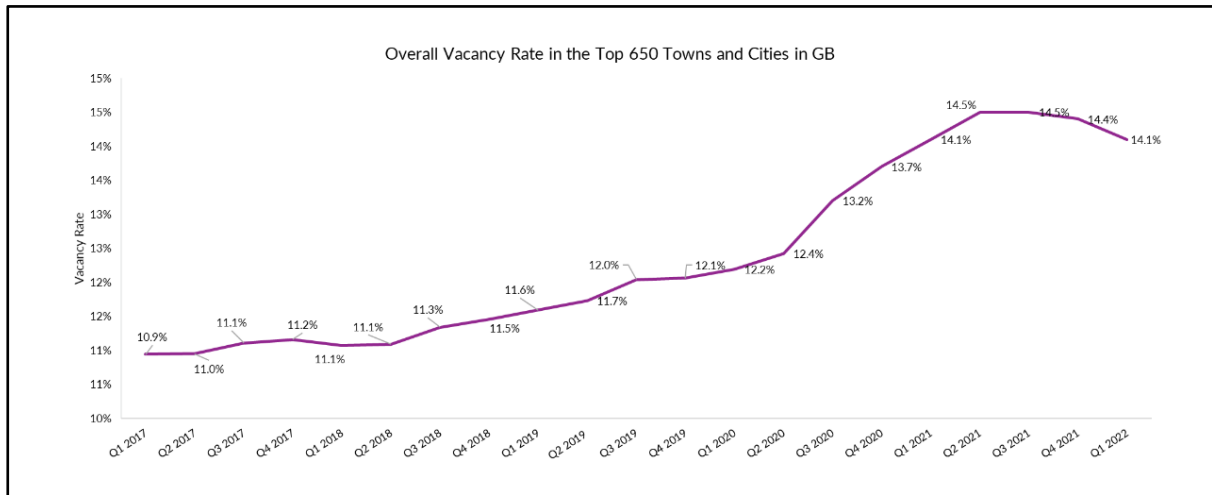
Void rates are the Town Centre Management term for empty properties.

Closure of Larger Units – with the collapse of large retailers like Debenhams and Arcadia there have been many very large retail units vacant, property owners have been left with prospect of having to repurpose the properties to attract new tenants. (Financial Times, 2021)

Closure of Smaller units – according to data from the British Retail Consortium working with Local data Company vacancy rates on the UK High Street are currently running at 14.1%

The Chart below illustrates the inexorable trend of increasing vacancy rates over the last 5 years affecting the largest 650 cities and towns in the UK

Chart 16: Overall Vacancy Rate in the Top 650 Towns and Cities in GB



(Local data company, 2022)

3.10 Town Centre shopping mix changes

Entrepreneurs have seized the opportunity brought about by vacant properties, but it's not always in the best interest of the Town Centre and its customer profile, they may not have the budget or experience to sustain a business or a professional image.

In early December 2022, BBC News [released its analysis](#) of two years of British high street data, from the Ordnance Survey. Covering the period March 2020 to March 2022 the stats paint an exclusive (but predictable) picture of the changes to British high streets since the start of the pandemic.

In March 2022 there were 9,300 fewer retail shops in Great Britain, a drop of 3% from March 2020 before the pandemic. There was an 8.5% decline in the number of clothes/shoe/fashion shops. (BBC, 2022)

- There were 328 fewer department stores, a 13% drop. (BBC, 2022)
- Nightclubs have seen a major drop, with 9% fewer than in March 2020. (BBC, 2022)
- Banks – a fallen victim to changing habits (which predates the pandemic) – 800 fewer today than before Covid. (BBC, 2022)
- Across Great Britain, there was a 5.7% increase in the number of cafes between March 2020 and March 2022 (also includes snack bars and tea rooms). (BBC, 2022)
- Hair and beauty services have seen a 5.9% increase. (BBC, 2022)
- Tattoo and piercing studios recorded a rise of 8.2%. (BBC, 2022)

- A 7.2% increase in the number of fast-food shops (these include fast food and takeaway outlets, fast food delivery services, fish, and chip shops). (BBC, 2022)
- Eating and drinking establishments on the whole have seen a 3.8% rise. (BBC, 2022)

Looking at the growth and development of new business in Hair and Beauty, Tattooists and eateries it must be acknowledged there appears to be services and entertainment evolution occurring

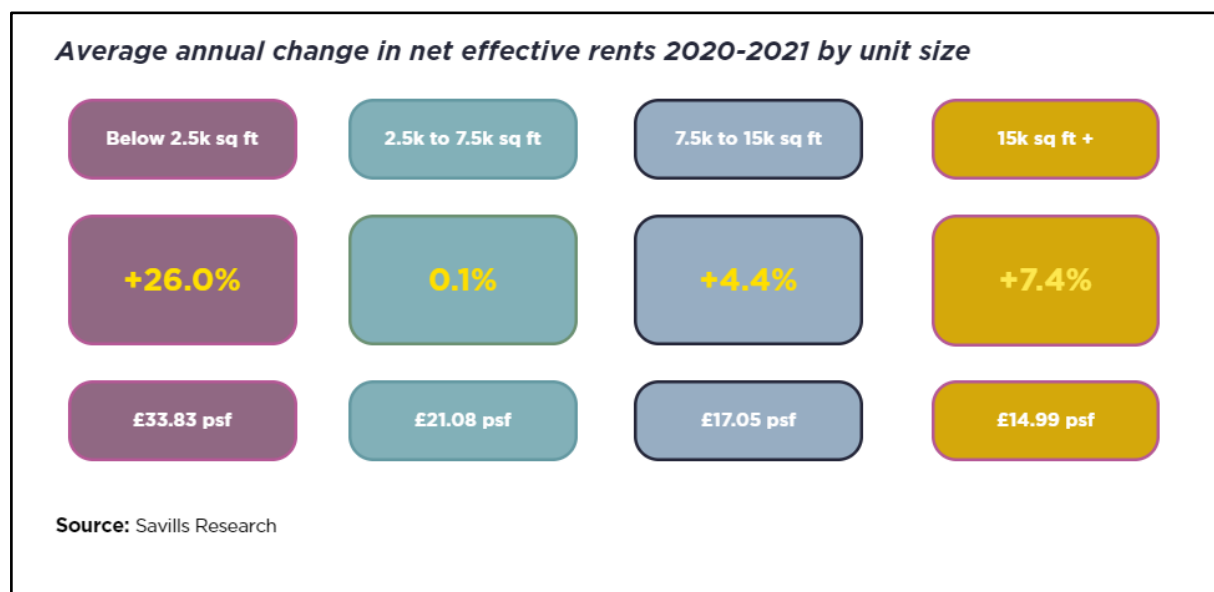
Charity stores selling donated secondhand clothing and books have boomed as the Town Centre has declined, taking advantage of their Charitable status being exempt from Business Rates

3.11 Increased Costs

Retailers have been hit from all sides with increasing costs including Rent

Town Centre properties come with a premium because of their location and potential footfall. The chart below illustrates the difference in rent increase by property sizes, and how supply and demand influence rates for commercial properties.

Chart 17: Average annual change in net effective rents



(Savills, 2022)

Demand for land in Town Centres keeps the price for space at a premium and therefore increasing rents, because business wants to be located in the Town Centre due to its centrality.

As stated by the Centre for Cities:

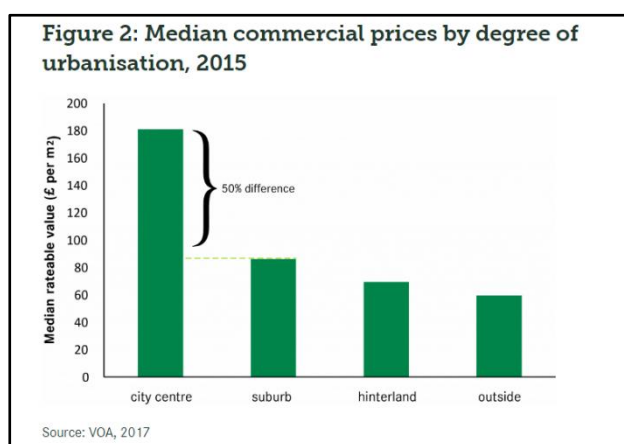
“Businesses favor urban areas because they provide one major benefit —proximity.

For many workers and firms, cities offer proximity to shared infrastructure and to integrated supply chains. For this reason, 60 per cent of jobs in Britain were located in cities in 2016.”

“In addition, the density in city centres provides businesses with access to knowledge. Close geographical proximity to other firms encourages innovation, creates deep networks, and increases information sharing. These benefits are particularly important to knowledge-intensive, high-skilled industries, such as finance or marketing.”

The chart below highlights the premium city centres carry as a result of the benefits they provide.

Chart 18: Median commercial prices by degree of urbanization, 2015



(Centreforcities, 2018)

Land and property values have been kept artificially high by developers buying potential development and redevelopment sites in a process known as land banking, whilst seen as an investment it also inflates land prices by limiting supply for the demand. (Centreforcities, 2018)

Business Rates

A tax model developed before the changes enabled by arrival of the digital age have increased the tax burden unevenly onto retail in the Town Centre.

According to The Centre for Retail Research in 2018 Retailers paid “**25% of ALL business rates paid by UK companies**, a total of £7,625m in 2018-19. They pay one-quarter of all business rates in spite of the fact that the gross value added by retailing to the national economy (GDP) is less than 10% (ONS, 2018).”

Increased Utilities

Recently energy prices have been increasing by unprecedented amounts, an article in the I newspaper quoted a study by energy analysts Cornwall Insight that SME's faced an average increase of 250% for Gas prices in the first three months of 2022. Although the UK Government is currently supporting business and domestic users via a price cap this is due to end in April 2023 leaving an uncertain future for many operations. (iineews.co.uk, 2022)

Minimum Wage

To celebrate the 20th Anniversary the National Minimum Wage, the Low Pay Commission analyzed the difference the NMW had made to wage growth, revealing that on 1 April 2019 the main minimum wage rate, the National Living Wage (NLW) reached £8.21. If instead it had risen in line with average earnings, it would be £6.54, if it had risen with prices, it would be £6.31 (RPI) or £5.39 (CPI) Retail generally pays low wages for its relatively unskilled work space so the majority of retailers have had to absorb an extra £1.90 in costs per hour per employee above the rate of inflation.

Increasing costs ultimately impact on profitability and sustainability of a business, there comes a point when an operation cannot absorb increased operating costs and must pass them onto customers.

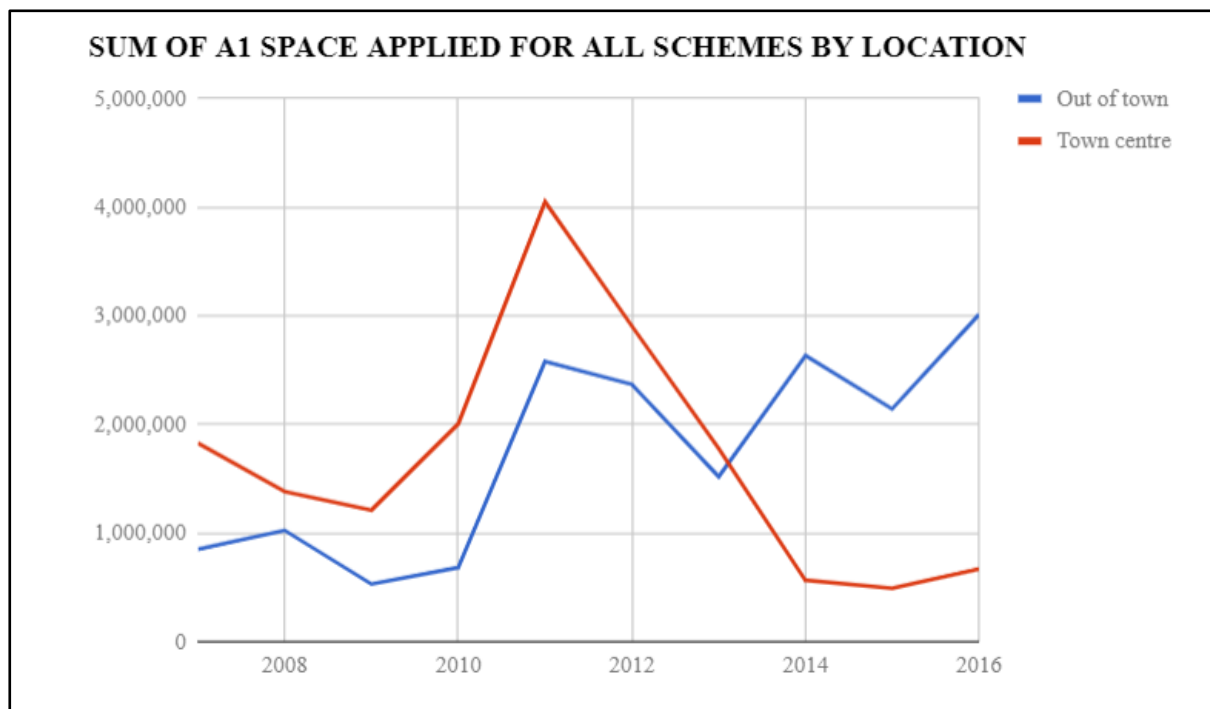
As the cost of goods increase this may have an effect on sales, which in turn effects profitability and so begins the circle of decline.

3.12 Lack of Investment

Ever decreasing circles – More money invested in Out of Town

As the Town Centre struggles with falling footfall, falling sales and empty properties, this has impacted on the opportunities for investors to make a return on their money, out of town shopping centres and online facilities offering a higher rate of return and therefore a more inviting investment.

Chart 19: Sum of A1 space applied for all schemes by location



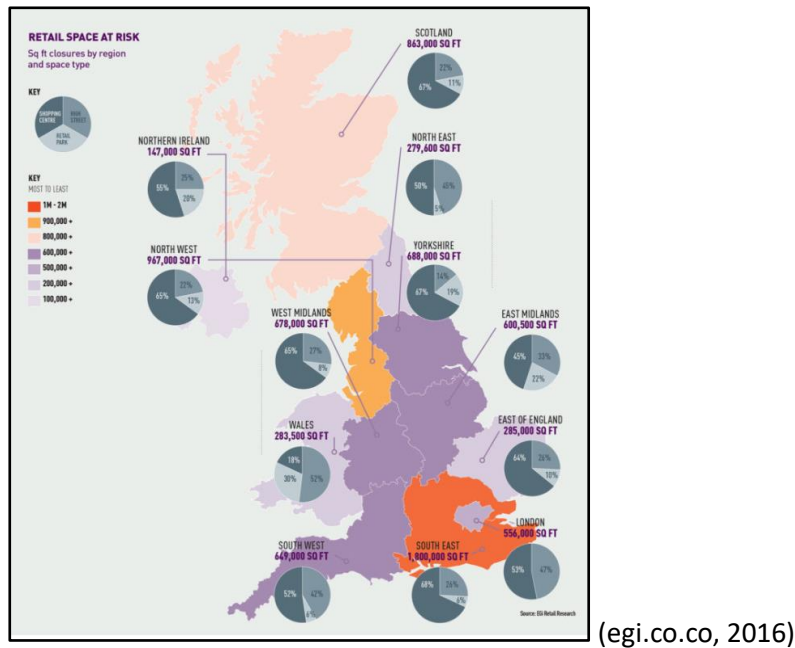
(egi.co.uk, 2017)

James Child Research Manager at EG Property illustrated the disparity in investment in a 2017 article about 10 things you need to know about out-of-town retail in the UK by highlighting the new floor space of planning applications for both Town Centre and Out of Town – The above chart helped to illustrate the fact that in 2016 developers applied for 3 million sq feet floor space for out of town developments versus 750,000 sq feet in Town Centre developments. (egi.co.uk, 2017)

3.13 Over Capacity

With the growth in online retailing, it is now widely accepted within the retail industry that there is more floor space than required. In 2020 Tom Whittington Savill's UK Director of Research put the figure at up to 40%. (Savills, 2020)

Chart 20: Retail Space at Risk



(egi.co.co, 2016)

The above map highlights retail space deemed at risk in 2016 – interestingly it shows Wales as being the most significant regional loser of space in the Town Centre, although this is not stated in the article it may be a reflection that Wales has more smaller Town Centres as indicted in the ONS census information. (ons.gov.uk, 2019)

3.14 Covid 19

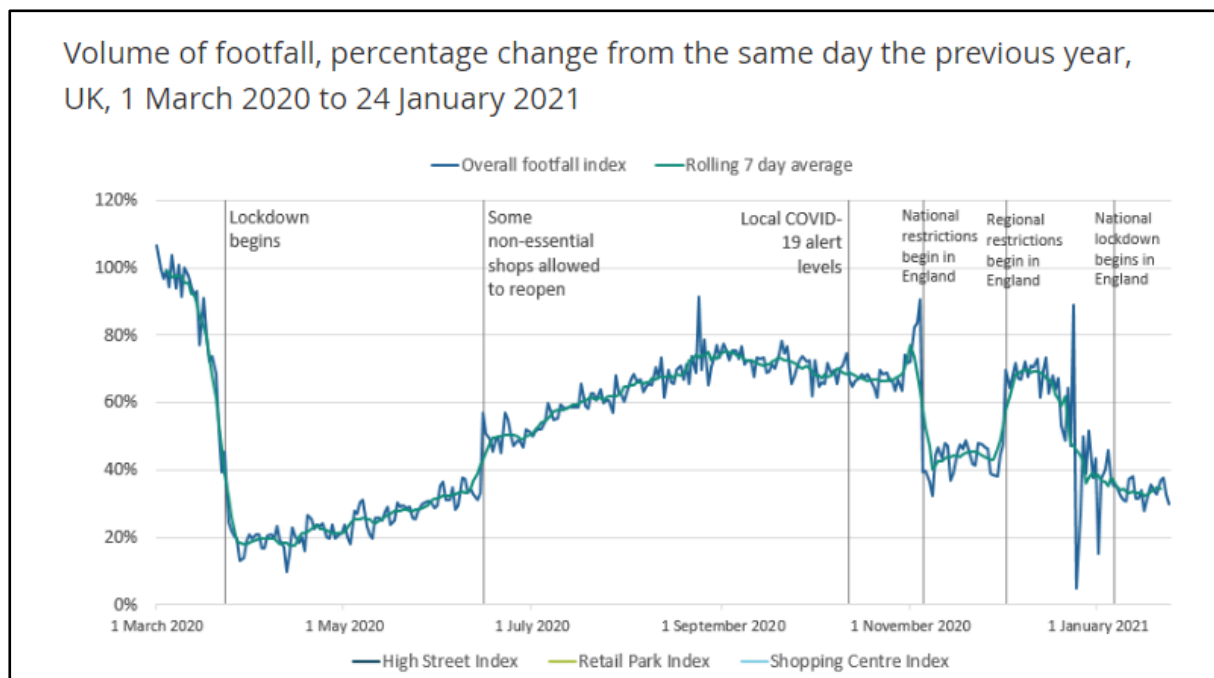
The Covid Pandemic has impacted on the retail sector in many ways:

Increasing online shopping during lockdowns –necessitating a need for customers to understanding how to purchase goods digitally.

Exposing greater weakness in struggling business by adding extra stress on finances and degrading the business models through lockdowns on non-essential retail.

The chart below shows the impact the Covid Pandemic had on footfall in the Retail sector

Chart 21: Volume of Footfall, showing percentage change vs previous year during Covid Pandemic



(ONS, 2020)

4.0 Barriers to Change

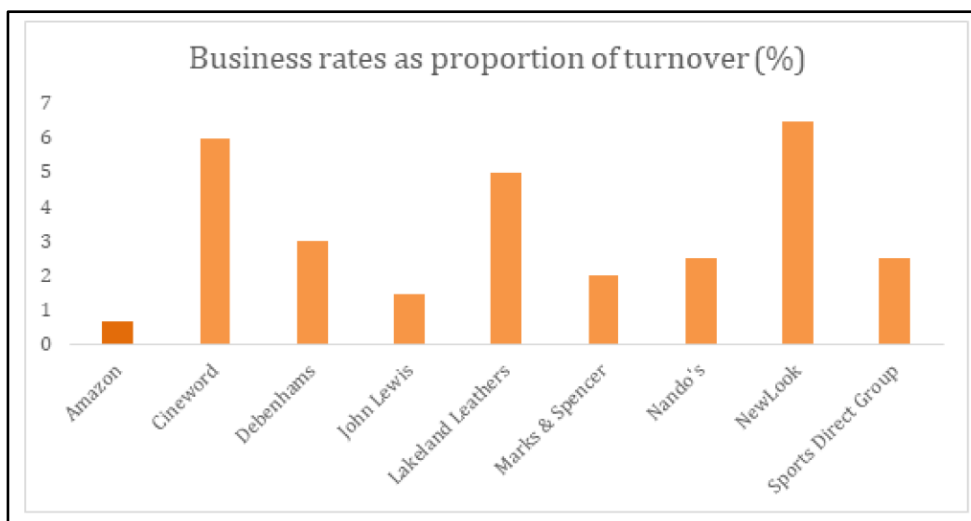
4.1 Business Rates / Online sales Tax

Set by National Government and collected by Local Councils Business rates are based on property rental values which are reviewed every 5 years. Unfortunately, business rates appear to penalize Town Centre locations because of their higher property rental values, in turn favoring out of town locations and online distribution warehouses. (Local Government Association, 2021)

This supports an uneven playing field.

Business Rates do not reflect sales values or turnover – giving online retailers a competitive advantage. The chart below illustrates that in 2018 Amazon paid £63.4 million in Business rates in comparison to Next's bill £100 million despite amazon having sales over £8.8billion more than double Next's sales. (The Guardian, 2017)

Chart:22 Business rates as a proportion of turnover (%)

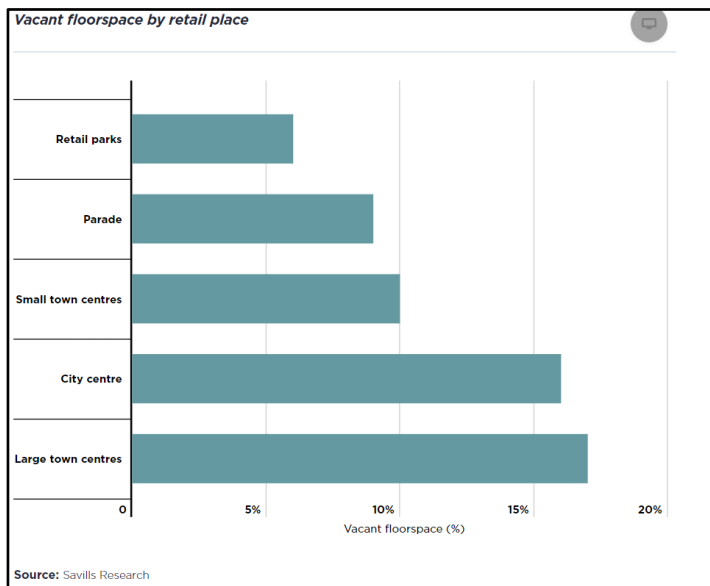


(The Guardian, 2017)

4.2 High Street Vacancy rates

In 2021 there was 150 million square feet of vacant retail space in the UK 14.5% of the total retail space, this fluctuates between different types of development, with the highest proportion of space available in Large Towns. (publications.parliament.uk, 2017) The chart below illustrates that Large Town Centres have the highest proportion of vacant floor space – It would be interesting to investigate this situation in more detail – Is this a result of Large Towns having had more larger Department type High Street stores (eg BHS or Debenhams)

Chart 23: Vacant floorspace by retail place



(Savills, 2021)

4.3 Over capacity

The measure of vacant units is referred to as a Void rate, there is also a measure of the length units have remained vacant, in a 2021 Research article Savills highlight the fact that “there is an increasing proportion of vacant units that are empty for long periods or even permanently, with 50% of vacant units having been empty for three or more years. (Savills, 2021)

This problem is exacerbated in most towns and cities across the country and accounts for 65 million square feet, most of which is no longer needed.”

“Furthermore, with changing consumer trends, we estimate that by the end of the decade, almost 308 million square feet of retail space will be redundant, increasing to 492 million square feet by 2040. It’s not that they don’t function as retail spaces, they simply have too much of it. This problem has been advancing for a long time and is reaching a critical moment in which we need a radical change in thinking of all retail places and town centres and the need to adapt and bring in a wider range of alternative uses.” (Savills, 2021)

This equates to a projected reduction of 50% of current retail floor space over the next 20 years, this is a worrying prediction which should focus all stakeholders to find effective solutions to overcapacity before it becomes an even larger issue.

4.4 Property Ownership

Fragmented ownership of properties is an obstacle to regeneration projects, making redevelopment difficult through separate ownership and absentee landlords.

In June 2018 British Property Federation reported in writing to the High Street and Town Centres Committee. (committees.parliament, 2018)

“As representatives of owners of retail property, it is perhaps helpful to start by explaining who owns our high street shops? The British Property Federation mainly represents large investors in retail property, and therefore our membership is skewed towards large investments. These will usually take the form of shopping centres and other multiple outlets, rather than standalone shops. The Federation's members will therefore typically own shopping centres, both in and out of town, across a range of towns and cities, plus large standalone units in some of the big cities.” (committees.parliament, 2018)

“There was a time when corporate investors and pension funds invested substantially in standalone shops, but that has changed over the past 20 years, as they sought scale, and wanted the ability to curate 'place'. Standalone units in smaller towns and cities will therefore mainly not be owned by big investors, but by a mixture of local authorities, smaller pension funds investing directly, and individual investors abroad and in the UK who have bought a shop to provide them with a pension via a Self-Invested Personal Pension (SIPP).” (committees.parliament, 2018)

These owners may have a limited understanding of retail and could possibly mean lease terms conform more with traditional practise as opposed to creative and innovative.

4.5 Restrictive Lease Agreements

Historically there have been lease agreements with “upwards only rent review” lease clauses – tying retailers into unsustainable leases. However there appears to be a movement away from these types of agreement in post pandemic times as landlords realize they are a stakeholder in the Town Centre and need to work with clients to achieve a successful outcome. Sarah Olney MP has presented a Private Member Bill in the UK Parliament with “A Bill to prohibit the use of upward-only rent review clauses in commercial rent agreements; to nullify existing such clauses; and for connected purposes.” (bills.parliament.uk, 2022)

4.6 Pandemic

The Covid Pandemic was a Black Swan event that effected all Stakeholders, but retailers who did not develop the ability to trade online were caught up in a perfect storm of events whilst still incurring the costs of operating a business. (The Guardian, 2017)

4.7 Declining High Street sales

In 2000, high streets were responsible for 50% of all retail spending; but by 2018, this had fallen to 36.6% (Centre for Retail Research, 2019) (MMU.ac.uk, 2020)

4.8 Multiple stakeholders

Multiple stakeholders need to be engaged and involved in any regeneration project.

The Association of Town Centre Management (ATCM in Medway et al., 2000) indicates that three main categories of stakeholders should be involved in TCM initiatives:

- A. Public sector – local authorities, police, public transport, tourist agencies, emergency services, training and enterprise councils, schools, colleges and universities, leisure centres.
- B. Private sector – retailers, banks/building societies, chambers of commerce, transport operators, property owners, estate agents, restaurants and cafes, pubs and night clubs, leisure facilities, hotels, solicitors and other professionals.
- C. Voluntary sector – civic societies, conservation groups, disabled groups, residents' groups

4.9 Stakeholder inequality

Local Government are the key stakeholder in regeneration of Town Centres, which can in some cases cause a conflict of interest – as reported in the Welsh Government report : Assessing the Impact of Car Parking Charges on Town Centre Footfall March 2015 a common sense response to the availability of free parking at Out of Town locations would be to offer free parking as part of a Town Centre program, but this would impact negatively on Council Income – leaving councils with a conflict of interest

As similar dilemma effects Local Councils and National Governments with redesigning the Business Rates system – any changes will have consequences on main stakeholder income.

Both examples could have a benefit to smaller less powerful stakeholders, but this is not a priority to the major stakeholder for reasons of self-interest. (Gov.uk, 2018)

4.10 Historical legacy

In 2004 a Report into the Role of Historic Buildings in Urban Regeneration observed that “Historic buildings play a central role in many towns and cities. They lend character to an area and have deep-seated associations for local residents and communities. They offer a foundation for regeneration initiatives.”

However, a counter to this observation may be that the legacy of previous incarnations of the Town Centre restrict the scope for future developments.

4.11 Politics – devolution

- A. Local – Local councils face re-election every four years and may have competing agendas with neighboring towns, and are based on local politics which might not represent what is best in the interest of the wider community
- B. National – The UK Government
- C. Devolved – In Wales and Scotland there is another level of bureaucracy with the devolved government, their wishes and competition with local councils.

4.12 Business Improvement Districts (BID)

A policy development from the Cameron Government, an idea originating from the US, a BID is a business led and business funded body, financed by a local BID levy to develop projects intended to provide additional services and support plus improvements to the business area covered by the BID. (British Bids, 2023) There are now over 270 BID's in the UK but they do have their critics because they are both unaccountable and undemocratic (Against Bid.org, 2023)

4.13 Parking charges

In March 2015 MRUK Research published a report commissioned by the Welsh Government, titled Assessing the Impact of Car Parking Charges on Town Centre Footfall. Based on evidence attained from interviews with six councils, 16 retailers and 208 visitors the executive summary mentions “Out of town developments were unanimously cited as being at least partly responsible for having a detrimental impact on footfall and business trade in the town and city centres. The fact that most of these developments offer free parking was felt to give shoppers a reason to go to them over town or city centres” But, later on states “Firstly, there is a lack of robust evidence that can be used to link car parking strategies and town centre footfall. Robust, numerical information based on recordings of footfall, business revenue, car park usage, and changes to car parking strategies is not available amongst the Local Authorities surveyed. Secondly, charging for car parking is one of a complex array

of factors that can influence town centre vitality. Disentangling them through qualitative research and a small-scale survey is a challenge. Further research using larger sample sizes would be needed to build a stronger evidence base. Finally, town centre economies are highly localized and are hyper-specific. Towns are very different economically; different factors are at play across locations. Parking strategies will need to be tailored to local areas to maximize the impact on footfall.”

4.14 Broadband availability

The national infrastructure commission said in Sept 21, that only 57% were happy with mobile phone data service and 58%, with broad band internet connections, in Town Centres. (National Infrastructure Committee, 2021)

4.15 Blind Optimism

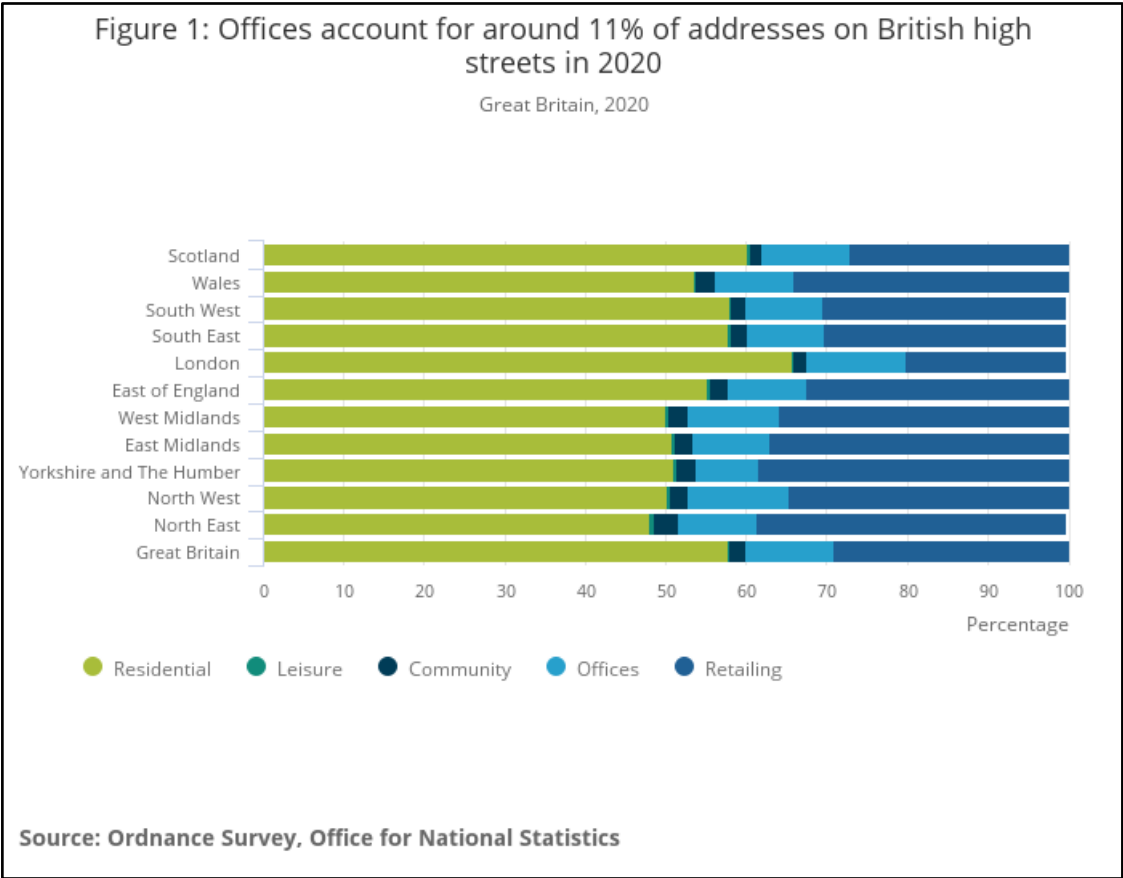
Reporting Blind Optimism – A survey of 2000 people conducted by NatWest identifies the Perfect Mix of Stores on a High Street with 74% saying they feel downhearted about their high street’s decline but continues with the respondents confirming their shopping habits do not support business on the High Street by stating only 17% do their bulk shopping with local small business. (Tyl by Natwest, 2022)

4.16 Accurate Information

Accurate Information – Any data is welcome but must be taken into context – an example is this survey from ONS who published the 2020 High Streets in Great Britain Report published in March 2020, working in conjunction with Ordnance Survey, mapping the location and characteristics of the high street highlighted some interesting facts about the town centre indicating there are more residential addresses in the High Street 57.75 vs Retail at 29.1% - This does not take into account Floor space measured as Square Footage or Shop Frontage length or HMO (Houses of Multiple Occupancy)

The Chart below shows the reports version of a High Street showing residents as the largest occupier by address.

Chart 24: Analysis of type of use



(ONS.gov.uk, 2020)



(ONS.gov.uk, 2020)

5.0 Initiatives and Schemes

The headlines concentrate on a negative commentary lamenting the end of an era, the first Grimsey 1 Report states ‘One thing is certain. The high street and town centre, landscape has irrevocably changed and there is no point clinging on to a sentimental vision of the past. ‘We have to start planning for a bold new world.’” (High Street Task Force, 2021)

Significantly, high values of monetary investment have backed several initiatives and these are ongoing, supporting these activities has come primarily from Central Government funds and is managed by Local Government.

5.1 Government Funding

There are currently multiple funding schemes available for investing in Town Centre regeneration, but in the majority they are limited

The Boris Johnson administration’s recent response has been the establishment of the Towns Fund for England, announced in 2019. This is a £3.6 billion pot, targeted at ‘struggling towns’ to improve their economic fortunes.⁶ It contains three strands: (Institute for government, 2021)

- £2.3 billion allocated for 101 towns that were prioritized and encouraged by government to submit proposals for projects of up to £25 million. (or £50 million in exceptional circumstances) (Uk Parliament, 2021)
- A competitive process for towns that were not among the 101 initially invited to bid for the remaining funding. (Uk Parliament, 2021)

The £830 million future high streets fund, aimed at regenerating 72 town centres that face significant challenges, though this is open to cities as well. (Uk Parliament, 2021)

There are similar schemes in the devolved regions: (Uk Parliament, 2021)

- Scottish Town Centre Fund – Scotland
- Transforming Towns Fund – Wales
- High Street Stimulus – Northern Ireland
- Community Ownership Fund - UK
- Levelling Up Fund – UK
- Soon to be added – SPF Funding
- Town Centre Entrepreneurship Fund – Wales

The Future High Streets Fund 15 Towns awarded £255 million. (Uk Parliament, 2021)

- Improving transport access to town centres
- Improving vehicle and pedestrian flow in town centres
- Congestion relieving infrastructure.
- Infrastructure to facilitate new housing and office space
- Projects that seek to substitute under-used and persistently vacant retail units into residential units.
- Heritage Action Zones (Conservation areas – dealing with disused / under used historic buildings

5.2 Supporting changes to Government Legislation

- Town & Country Planning Act (Amendment) 2020 (lordslibrary.parliament.uk, 2020)
 - Revision of Use Classes
- Consultation on Permitted Development Rights (Dec 2020) (lordslibrary.parliament.uk, 2020)
 - Making it easier to change from Class E Commercial, Business and Service to Class C3 Residential
- Negative comments re housing.
 - The RTPI, Royal Institute of British Architects, Chartered Institute of Builders and Royal Institute of Chartered Surveyors wrote to the Government to protest at the change, saying that it may lead to poor quality housing and may “pull the rug out from under high street businesses just as they prepare to reopen”. (BRADY, 21)
- Measuring Footfall and Sales
 - Centre for Cities Tracker used anonymized data from mobile phones and bank card usage the tracker was used to measure footfall and spend as the High Street recovery progressed after the pandemic lockdowns forced the closure of majority of Town Centre activities. (Centreforcities, 2018)

5.3 Reviews

The Government have supported numerous reviews into the decline and regeneration of the Town Centre including: (Thurstain-Goodwin, 2014)

Examples of these are:

- Portas Review 2011
- Grimsey 2013
- Plan for the High Street Report 2018
- High Street Task Force – Institute of Place Management 2020
- National Infrastructure Commission 2021

5.4 Expert Panel

High Streets Task Force

The High Streets Task Force is comprised of experts, providing tailored guidance and advice to local authorities seeking breathe new life into their local high streets and town centres as they battle against changing consumer habits. (High Street Task Force, 2021)

Business Improvement Districts (British Bids, 2023)

A Business Improvement District is a defined area in which a levy is charged on all business rate payers in addition to the business rates bill. This levy is used to develop projects which will benefit businesses in the local area. (British Bids, 2023)

There is no limit on what projects or services can be provided through a Business Improvement District. (British Bids, 2023)

The only requirement is that it should be something that is in addition to services provided by local authorities. Improvements may include, but are not limited to, extra safety/security, cleansing and environmental measures. (British Bids, 2023)

5.5 Relocating Public services.

Coventry City Council condensed 27 separate buildings and employees into a new City Centre redevelopment in 2016, spearheading a move to bring 13,400 office jobs as part of the redevelopment in the Centre of Coventry.

In 2011 the University of Wales moved to new purpose built campus in Newport City Centre, closing down the old out of town campus with the financial support of the Welsh Assembly, Newport City Council and Newport Unlimited (an Urban Regeneration Company) to fund the £35 million project. 'This has brought an extra 2700 students plus employees into Newport City Centre, increasing footfall and supporting business already situated in the Centre'. (Centreforcities, 2018)

Business Incubators are dedicated space offering support for start-ups or small business looking to develop, their purpose brings small business together and develops business communities, with the hope that through growth they will become larger tenants in the future. They act as a draw to increase the Town Centre retail and service scene whilst attracting more footfall into the High Street. 'One example is the Crown Building in Southport, a 15000 sq feet retail building currently under conversion after Sefton Town Council got funding from the government's Town Fund scheme'. (BBC, 2021)

Co- working spaces – in a similar vein to incubator units – co working spaces offer relatively cheap access to well serviced desk and office space, offering a base and networking opportunities. (Denbighshire.gov.uk, 2023)

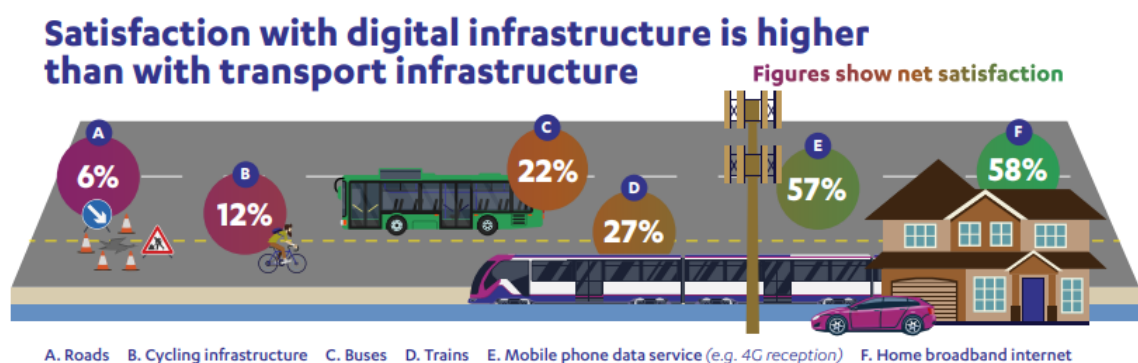
5.6 Physical Intervention

Public Transport Infrastructure – Town Centres are pinch points for transport, a well-organized and operated public transport system can ease access to for business and amenity users. In the French city of Montpellier a tram system was developed in 2000 ensuring a reliable network connecting the suburbs to the city Centre. TAM (Transports de l'Agglomération de Montpellier) is a PPP (Public Private Partnership) company operating trams 84 stations over a 60.5km length network. (Centreforcities, 2018)

5.7 Monitoring Infrastructure

The National Infrastructure Commission was established in 2015 by the UK government to provide independent analysis and advice, in September 2021 it reported on: Infrastructure, Towns and Regeneration. During its investigation it surveyed public satisfaction with regards to Urban Infrastructure – highlighting opportunities for improvement as illustrated below. ‘Roads and accessibility showing the lowest satisfaction level, but none of the infrastructure showed a satisfaction level above 58%. This may be regarded as a worrying state of affairs for the Urban Infrastructure’. (National Infrastructure Committee, 2021)

Chart 25: Satisfaction survey of Town Centre Infrastructure



(National Infrastructure Committee, 2021)

5.8 Monitoring Key Performance Indicators

The Centre for Cities is a Charitable and Independent think tank (originally a joint venture between the London School of Economics and The Institute for Public Policy Research) with a mission to help UK Cities and Towns realize their economic potential. ‘Using anonymized data for mobile phone location and anonymized payment card spend data created a tracker for the top 63 Towns and Cities. Measuring spend and footfall before and after the pandemic – tracking their recovery’. (Centre for cities, 2022)

Towns Fund

In July 2021 the Michael Jenrick MP announced on behalf of the UK Government. The launch of the Towns Fund in England. (Gov.uk, 2021)

Giving Councils the power to take derelict buildings into public ownership through compulsory purchase orders. It also gives encouragement to convert empty shops and offices into housing.

In Wales the Senedd similar Funds aimed at Town Centre Regeneration under the title Transforming Towns – this is summarized in the following infographic.

Chart 26: Transforming Towns



5.9 Municipal Wi-Fi

Free Wi-Fi in a Town Centre ensure connectivity throughout the area, giving users access allows them to use any mobile device requiring the internet connection. In turn this also provides data for Town Centre Management to analyze or possibly a revenue stream through selling the information collected. (Caerphilly.gov.uk, 2022)

5.10 European Initiatives – The Urban Laboratory

During 1977 in the French City of Montpellier George Frêche was elected mayor

He formulated a simple but grand spatial vision of reconnecting the city with the Mediterranean on which its early fortunes as a trading town had been based. The plan was unusual for defining the areas not to be developed. It reintroduced the River Lez to the city centre to provide a ‘spine’ for development, (which has since been re-adapted to deal with climate change-driven flooding) Development areas were planned with a mix of uses & tenures and amply green space to create more balanced communities, with up to 25% of new residential being social housing.

Frêche persuaded central French government to use the city become the nation’s ‘urban laboratory’ , with many large-scale ‘pilot’ initiatives tested as a result including to redevelopment of significant military landholdings (as the new Antigone neighbourhood); and the reintroduction of trams and city centre pedestrianisation (one of the first European cities to do both) in the 1980s.

Finally, and possibly most critically, Frêche recognized the latent economic potential of the city’s University and the power of public-private partnerships – for example the highly-effective SERM agency, which has been patiently assembling land over the past 30 years, enabling delivery of essential infrastructure and then competitively harnessing private developers to create new/renovated neighborhoods.

The City has grown in population from 28th highest population in France to the 8th largest with a population of 430,000, growing 43% in 30 years. (Academy for urbanism, 2017)

5.11 John Lewis – repurposing commercial property.

A Press release from John Lewis Partnership dated 9th June 2022 shows an example of diversifying a traditional town centre-based business model to the benefit of all, in this case John Lewis are looking to generate an alternative income from repurposing buildings and land for housing

Announcing the first three locations where it proposes to build new rental homes that would offer the trust, quality and service that people expect from John Lewis.

Continuing that “The homes would form part of the UK’s growing 'built-to-rent' property market as the Partnership seeks to raise standards in rental property, both through our role as developer and a commitment to manage the buildings ourselves.

A period of public consultation for Mill Lane, Reading, will take place later this year.

The three locations are the first sites to be announced after confirming our target to deliver 10,000 homes in the next ten years - 5,000 of these will come from schemes on the Partnership's own property portfolio. Moving into the rental homes market is part of our long-term plan for 40% of profits to come from outside of retail by 2030.

The homes would be built for different sized households and designed to our high standards. Residents would have options for short and long-term tenure and to have the homes furnished by John Lewis. Creating a sense of community through incorporating shared spaces and facilities such as roof gardens and fitness studios and exploring how schemes can play a role in the wider community would be integral to our approach. (John Lewis Partnership, 2022)

5.12 Council lead regeneration converting building to residential use.

In Stockport the Local Council have created a Housing Company, Stockport Homes a Company Limited by Guarantee to manage, deliver and develop social housing, operating as an “Arm’s Length Management Organization” it operates independently from the council. Whilst working with the council on town centre regeneration projects developing housing including the Tatton Cinema in 2020, having been derelict since 2001. The Headline below captures an illustration of the project along with a summary of key details.

Chart 27: Headline from Online article

Stockport Homes Ltd, Council's Housing Company, delivered 1,000 units in 2017-18, half social (including affordable rent) and half shared ownership



Former Tatton Cinema, Stockport: 7 apartments for shared ownership and 26 apartments for rent for the over 55 age group are under development

(Rowlinson

construction, 2020)

5.13 Planning Legislation

In 2020 the UK Government announced an initiative to help with Town Centre redevelopment, by amending planning legislation to simplify the classification of business uses reducing the red tape required to convert commercial properties to different uses. As detailed below:

Class A (shops, financial and professional services, restaurants and cafes, drinking establishments and hot food takeaways) and Class D (non-residential institutions and assembly and leisure uses) were revoked entirely, Class B (offices, workshops, factories and warehouses) was amended and three new classes were added: Class E (commercial, business and service), Class F.1 (learning and non-residential institutions) and Class F.2 (Local community).

At the end of March 2021 they also confirmed that the change of use from Class E commercial, business and service to C3 residential, would go ahead. Making it easier to convert commercial premises to housing.

The announcement also included the acknowledgement that The RTPI, Royal Institute of British Architects, Chartered Institute of Builders and Royal Institute of Chartered Surveyors wrote to the Government to protest at the change, saying that it may lead to poor quality housing and may “pull the rug out from under high street businesses just as they prepare to reopen”. Indicating a chasm between reality and planning practitioners. (Commonslibrary.parliament.uk, 2021)

5.14 Potential clash of night life and housing

A quick win for Town Centres and stakeholders to generate increased footfall, jobs and revenue generation is the development of the nighttime economy. However, this does not come without extra costs incurred with Policing and Clearing up after revelers. But as more housing is developed in town centres a new problem is growing from noise pollution.

In a paper entitled Transformations in the night-time economy in English town centres: challenges to management by M. Roberts alludes to

“Noise disturbance to local residents came fifth on the list. It was the inner London boroughs who recorded this as a serious problem. Poor signage is also a problem, and one provincial city council reported that because of this customer’s from bars and night clubs tended to get lost and to follow routes through residential neighborhoods” (Witpress.com, 2005)

5.15 Strategies for Town Centre Smart-Decline

Urban shrinkage applies to situations where there have been years of decline driven by underlying structural change and leading to a crisis (Hummel, [Citation2015](#)). Whilst the smart-decline literature focuses, on places suffering from population decline, this paper engages instead with the continued net-loss of commercial operators within town centres and the resultant physical blight from empty and unmaintained properties. Net-loss of commercial operators in town centres can result from wider urban decline (Hollander & Hartt, [Citation2019](#)), but this paper focuses on the more generic challenges emerging from externally driven brand names closures.

Whilst retail development within town centres may no longer be viable, chasing external finance for demolition and replacement uses is not conducive to the continuation of the core purpose/identity of these central places. Developing smart-decline policies implies a different way of thinking. There needs to be an acceptance by local actors, not only of the problem, but that the urban area considered will not grow back to its “former glory” (Hollander, [Citation2018](#), p. 4). This third stage of acceptance involves policies to stabilize the dysfunctional market rather than growth. The fourth stage involves focusing on opportunities for place improvement through shrinkage.

Whilst much of the smart-decline literature has focused on the demolition of vacant properties, achieving these aims requires town centre policy to focus more on rehabilitation and adaptive reuse. This approach will help support place continuation, density of offer and place quality. Patience is needed where there are likely to be pressures for growth-orientated quicker fixes that do not

sufficiently consider the potential for the continuation of visitor/community attraction uses (Heil, [Citation2018](#); Robertson, [Citation2001](#)). (tandfonline.com, 2021)

This policy is being actively pursued by Denbighshire Council in Rhyl, but it is not currently acknowledged, as such in the Town Regeneration Plan.

6.0 A Tale of two towns - Case Study Rhyl and Llandudno

“It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of Life, it was the season of Darkness, it was the spring of hope, it was the winter of despair, we had everything before us, we had nothing before us.” Charles Dickens

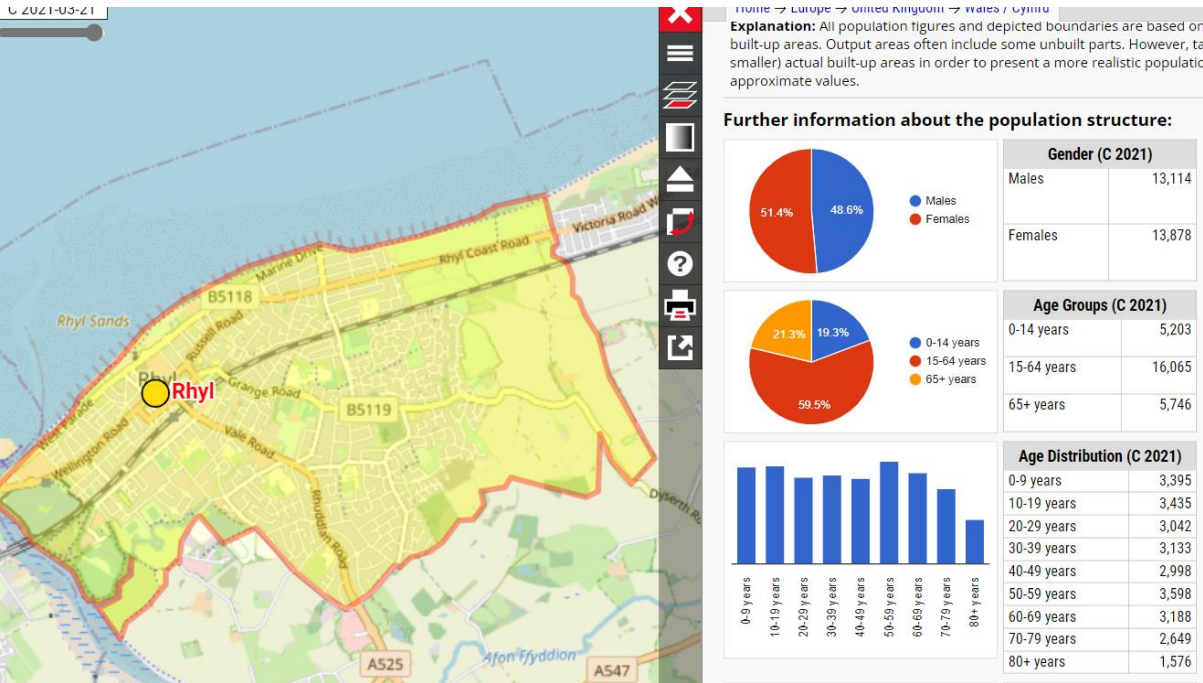
Comparing the story of developments in the Town Centre in two key North Wales locations can illustrate the difference between success and survival of the High Street.

Rhyl and Llandudno are both seasonal, holiday destination towns located on the North Wales coast. Llandudno was voted the second-best seaside town in the UK by Which Members in 2022, Rhyl wasn't mentioned in the survey with 87 recommendations. (Which.co.uk, 2022)

Rhyl having a slightly higher population (25149 vs 20800) Rhyl is classed as, a deprived area by Welsh Government and has a high proportion of families “[Multiple Deprivation](#) in West and South West Rhyl is among the highest in Wales and encompasses worklessness, low [incomes](#), and poor educational outcomes amongst other things. Unfortunately, Rhyl West 1, Rhyl West 2 and Rhyl Southwest 2 are identified by the Wales Index of Multiple Deprivation as areas of ‘deep-rooted’ deprivation.” (Conwyanddenbighshirelsb.org.uk, 2021)

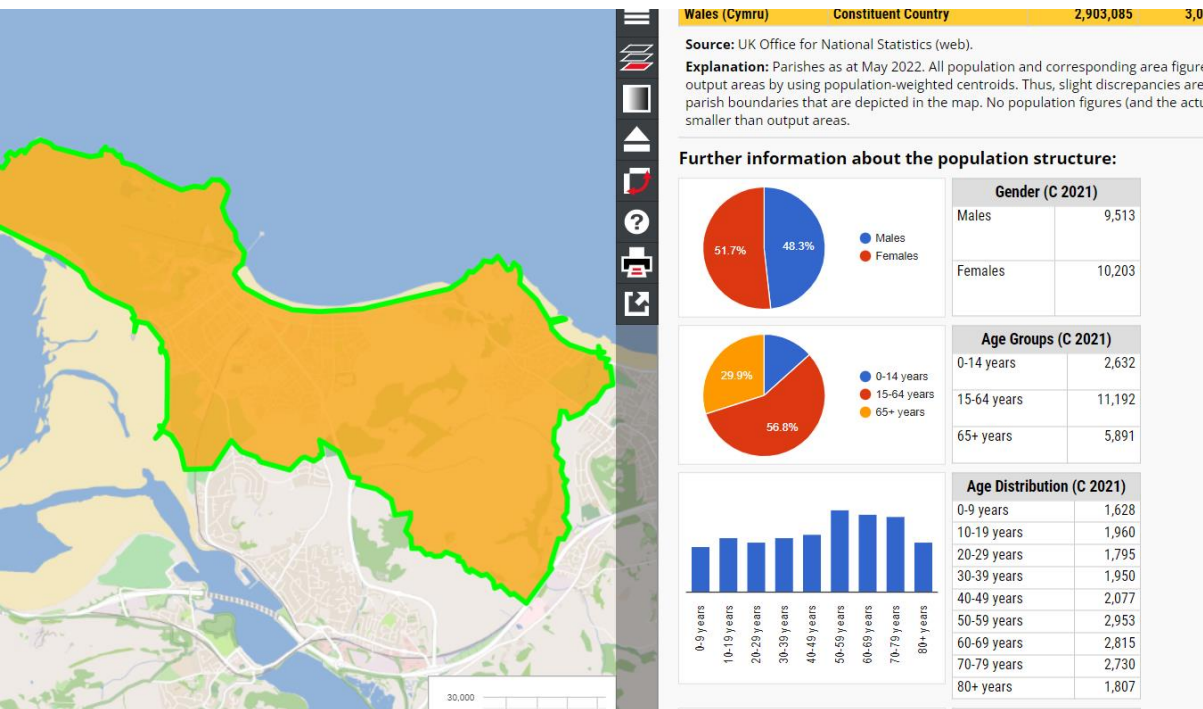
The following diagrams illustrates a notable difference in the population age range, with Llandudno having 29.9% of residents over 65 years of age, against 21.3% in Rhyl.

Chart 28: Demographic Rhyl



(Citypopulation.de, 2021)

Chart 29: Demographic Llandudno



(Citypopulation.de, 2021)

Both have smaller neighboring towns close by Prestatyn is 4.1 miles from Rhyl, Colwyn Bay is 4.5 miles from Llandudno.

However, that is where the similarities stop, Rhyl town centre is struggling to survive, Llandudno appears to be thriving.

Rhyl town centre has fragmented property ownership of retail units and absentee landlords, whereas in Llandudno 80% of commercial properties are under the control of Mostyn Estates, run on behalf of the Mostyn Family, the largest landowners in North Wales with a 500-year relationship with the town. (llandudno.com, 2022)

The void rate in Llandudno was 7% in 2022, no comparable information was available for Rhyl, but the National average was running at 13.8% showing how strong the town centre is in Llandudno.

Retail development in Rhyl has been based on land availability, with two out of town developments competing for customers located two miles from the centre on the edge of the town. In Llandudno there are also two out of town retail developments, but they are both a very short walking distance from the centre on land made available by Mostyn Estates.

In the last ten years, with developments in out of town and online retail, plus the additional issues created by the demise of some major retailers, many changes have taken place in both towns but with greatly differing consequences. Rhyl has suffered with the opening of a new retail park in neighboring Prestatyn, leading to major anchor operations closing town centre operations and relocating from Rhyl to Prestatyn Retail Park (notably Marks and Spencer and Next)

The demise of Debenhams and Arcadia left two large empty units available in Llandudno, where other retailers identified an opportunity to trade and Marks & Spencer and the Range quickly opened in the vacant units. M&S moving from two town centre units left a potential huge void in the town centre but again both units were quickly filled with new tenants – Poundland and a redevelopment project that included a food and leisure destination with a business hub.

Denbighshire Council has developed an in house Regeneration Plan for Rhyl, applying for adhoc grant funding to support regeneration projects

Conwy Council employed the services of MACE an UK based International Consultancy and Project Management company to write it's 10 year Regeneration Plan. (www.denbighshire.gov.uk, 2022)

Rhyl traders voted to form a Business Improvement District in 2018, this has been an active force for business in the town contributing to cleaning and maintenance, developing a safe and welcoming

environment, supporting marketing and events, plus offering free business support to levy paying members.

Llandudno does not have a Business Improvement District

In Rhyl, a recent property transaction may turn out to be a missed opportunity for Denbighshire Council, the White Rose Shopping centre in the heart of Rhyl's Town Centre was sold before going to auction for the asking price of £1.1 million pounds, comprising of 34 units with a total floor space 133,268 sq feet, an annual rate generation of £553,143 and parking for 300 cars. There are numerous units empty and more becoming available – Iceland is about to close. This would make an excellent community based shopping centre, with space for a Community Café – ideal as a centre for a number of vulnerable groups, plus incubator space for business startups.

By contrast 1 mile out of Rhyl Town Centre, the Marine Retail Park was put up for sale by its owners with 102,316sq feet, 11 units and a rental income of £1,148,690 pa plus parking for 659 with an asking price of £17 million.

There are no comparative sales in the Llandudno commercial property market, the most recent bankrupt commercial properties to become available (after the demise of Debenhams and Arcadia) were snapped up relatively quickly.

The comparison of the two towns in North Wales highlights the need for Government support on needs led basis, helping regenerate Town Centres that struggle with deprived social needs and require a stimulus input with support, whilst letting private enterprise regenerate the more affluent, profitable Town Centres.

7.0 Findings and Discussion

Having conducted many hours reading and research into the subject of the regeneration of Town Centres, and with the benefit of hindsight, the author would say that the scope of this subject matter is huge.

After conducting research in relevant literature surrounding the topic of the Town Centre of the past, present and future the key findings were:

- All Typology of Town Centres can only ever be used as a limited guide, because each Town Centre is unique with its own individual circumstances as outlined in Measurement and Typology of Towns – There is an opportunity to develop a more specific guide to typologies but it will never account for the individual DNA of towns.
- Surprisingly not all Bricks and Mortar retailers are helpless victims of the rise of online shopping – Chart 3.2 shows that 7 out of 10 UK's biggest online retailers are traditional retailers who have successfully adapted their business model - the town centre is the ultimate loser to online retail.
- The Digital revolution has impacted on all aspects of the operation of traditional businesses based in the Town Centre, Retail, Eating, Working and Banking – as discussed in the Chapter titled Drivers of Change – the evidence showing decline in traditional operations and behaviours is incontrovertible.
- Charts 11 & 12 showing the penetration of online banking confirm why Banks are closing at such a rate on the High Street
- Car ownership is progressing towards 90% of all households in the UK as illustrated in the Chart for 3.8 – it's not going to change anytime soon, should we be looking to accommodate cars in town centres.
- High void rates and Over Capacity highlight the need for a changing the use of building in the Town Centre – Chart 16 illustrates the trend
- Increased costs listed in 13.2 show the disproportionate disadvantages that face Town Centre based business operators. E.g. Business Rates and Rent – These increased costs are supporting the benefits of changing to an online business models – proving that moving to a digital model is more beneficial
- The inequality of the Business Rates system is highlighted in Chapter 4 Barriers to Change – there needs to be a review of the system with immediate effect – Business rates were designed before the Digital Revolution – and have created an uneven wicket that favours business models based away from the Town Centre

- Over capacity is highlighted in point 4.3 Retail Space – it's only going to get worse as the online trend continues towards the digital model. The Out of Town Centre will be the next retail problem – it's beginning to happen now.
- Property Ownership is highlighted as a Barrier to Change in Chapter 4.4 in the majority the most successful Town centres / High Streets are the ones with the least numbers of owners – this prompts the thought that Town Centres may be better off with fewer owners – and although Local Councils have the right to complete Compulsory Purchase Orders are they the best organisations to run a property portfolio as an enterprise?
- Relocation of Key services back into the Town Centre as mentioned in Chapter 5 is a positive action – Council office functions and educational facilities – maybe this could be encouraged through financial incentive
- Another initiative that was covered was Changing building use and / or converting upper floors to residential use should be encouraged – this could be achieved through financial incentives like interest free loans or tax breaks. This would improve footfall, productivity of building in the Town Centre. Looking at my previous retail experience I think of all the High Streets in North and Mid Wales with potential housing above them.
- Developing housing in Town Centres from unused commercial space should be a government priority – with financial incentives to achieve momentum.
- Public transport needs reviewing – how are the British Public going to be converted from the dry, warmth and comfort of their own cars to sit next to a stranger on a bus.
- Accessible Wi-Fi should be available for all Town Centre users – think of the data (that's a business model for councils to adopt)
- Tracking activity in all Town Centres should be a basic minimum to provide data to track developments in the Town Centre – the Centre for Cities used anonymised information from bank card transactions and mobile phone data
- Parking charges – Councils have got to stop using Parking as a revenue stream. Anecdotally Wrexham Town Council are currently operating a charging system for users between 8am and 11am, charging a maximum £1.80 for 3 hours then free after 11am. This appears to be a well-structured plan, returning a reasonable income, using restrictions to avoid abuse whilst remaining a reason proposition to paying customers.
- Electronic Vehicle Charging Points – There is currently a shortage of EV Charging points – Accessing them in Town centre car parks can be used as a win situation for both Customers and Councils, having a reliable charging infrastructure is a positive draw for the customer and has the potential to generate income for the council.

- It was positive to learn the Government have made a huge amount of funds available to Councils to invest in Town Centre regeneration – however there may be a need to make stricter criteria for projects to maximise impact.

8.0 Conclusion and Recommendations

The nostalgic vision of a bustling High Street full of shops belongs in the past, the current situation reacting to changes traps the Town Centre in the present, and if change fails to be actioned it will pose a threat to the future.

What the future holds is dependent upon the leadership and vision of Government at a National and local level, with positive support and input from other Stakeholders.

Regenerating Town Centres is an emotional subject for residents across the country, but over the years town centres, have developed, off the back of trading and business operations. We should not lose sight of the commercial outcomes derived from business activities in the town centre.

Previous reports (Portas 2011, Grimsey 2014, High Street Task Force 2020) recommend using Leisure and Entertainment as the focus for regeneration.

But the author has reservations about the feasibility of these recommendations which concentrate mainly on the development of progressive retail and experiences.

The digital age will progress with online shopping and entertainment evolving and growing, out of Town Centres will also be impacted and need to evolve – both the High Street and the out of Town Centre will compete once again for the same developing new markets. But the Out-of-Town Centres have the competitive advantage gained by ease of access and free parking. The author believes the Town Centre needs to do something creative sooner rather than later, with the knowledge that the digital age will make out of town retailing search for alternative uses of vacant floor space. Design Thinking offers a methodology that serves the end user, perhaps if Government, Local government and retailers considered this methodology, they may find a way forward.

The author recommends the following “quick win” actions take place to help regenerate the Town Centre.

1. Re-develop unused retail and office space into housing accommodation – this would increase the footfall and develop opportunities for new services to develop. Currently, it’s only a recommendation – it should be a requirement.
2. Redevelop unused retail and office space by relocating Council services and educational establishments. (Universities and Colleges)

3. Redevelop space to accommodate parking for cars – level the playing field with Out-of-Town Centres.
4. Use some Retail space for incubator units – managed effectively the rent raised from dividing up shop units may not be significantly less than the rent from a larger tenant.
5. Use some Retail space for specialized retailers e.g. Jewelry Quarter, Clothes or even Repair centres. (To fit the growing reuse mantra)
6. Use some Retail space to house the numerous support agencies, they would appreciate the common space and reduced overheads, whilst citizens would benefit from the interaction of the support agencies.

Clear leadership is fundamental to change.

Government is recommended to provide solid leadership, frameworks and collaboration – funding is only part of the leadership required.

1. Use Best Practice
Adopt Town Centres to be pilot schemes to lead the way – templates for the future.
2. Incentivise development of Town Centre housing
Offer Tax incentives or interest Free Loans to Councils or Private Enterprise
3. Business Rates
Review and design a fairer Tax system for the Digital Age – Business Rates are out dated.
4. Online Sales Tax or Additional VAT
Investigate a simple solution – Whatever the Tax – undoubtedly it will be passed on to consumers, as Business Rates are currently.
5. Accountability from Local Government
Make a Government Department e.g. Office for Town Centre Regeneration to stop vanity projects developing a 5 star Eco Hotel in Todmerdon is not the path to Town Centre regeneration
6. Ensure fair distribution of funds.
Cheadle in Staffordshire isn't a deprived area as measured by the Governments Levelling Up Fund Priority List – unfortunately there are so many other towns in Staffordshire that could make better use of the money

Local Government are recommended to:

1. Review their Funding model.
Raising money through parking charges is quick, easy, and lazy.
Best Practice - Stockport Housing Ltd
2. Make parking a permissible price not a restrictive price.
3. Create a competitive edge by Installing EV Charging points – a possible revenue stream.
4. Actively pursue Compulsory Purchase Orders for dilapidated premises and long-term vacant premises.
5. Set and direction to get on board with the agenda – in this years round of SPF funding the Councils in North Wales were still looking for ways to increase footfall. This will look after itself when there is a reason to visit the town centre – not a penalty or as a poor alternative.

There is too much retail space in the UK -this is evident from the literature reviewed. The excess space in Town Centres will require an identification and for a proactive plan to be developed.

There are considerable funds being invested by both National and devolved governments into attempting regeneration in town centres.

Government has encouraged local councils to lead redevelopment projects – Clear metrics are recommended as a mechanism for performance measures with tangible penalties for ownership by Local Councils.

At some point the talking must stop and action must take place, through the authors research, he has become aware of the high value opportunity, being provided by the government to local government, and the waste and disparity, between some of the regeneration schemes being undertaken.

There is a huge opportunity to redesign the town centre with a view to the future – leaving behind the past. There will always be a need for some shops and offices but as society evolves in the digital age we need to look at more basic human requirements. Housing is the future for town centre regeneration.

There is a huge opportunity for local councils to diversify their business model from raising money from parking charges, to being a landlord of commercial and residential property portfolios. The potential benefits for all parties from town centre regeneration are varied and enormous, planners talk of developing housing on brownfield sites, but there is much missed, opportunity in town centres,

Changing the Local Government business model for town centres – It is recommended local council's should, take the lead, using central funding to make compulsory purchase orders, where necessary, converting upper floors of retail units and under-utilized space to housing accommodation. This would generate a new revenue stream – there is potential for working partnerships between councils and local social housing organizations or with private operators to manage workload responsibilities. Increased living accommodation equals potential rental income, potential council tax payers, increased business tax income etc.

The same business model change should also apply to parking charges. Councils looking to establish a successful Town Centre should be encouraged to develop an acceptable compromise between charging for parking and using parking charges as a cash cow to make up for shortfalls in spending.

But it should be remembered that every Town Centre is different, geographically, connectively, physically, socially, and economically.

In the next 10 years out of town retail, supermarkets and shopping centres will be facing massive changes as the digital age replaces more physical shopping with the online alternative and made to measure clothing, but with fewer constraints they will be easier and cheaper to redeploy to alternative uses.

It is recommended that all town centres, be monitored for footfall and expenditure, the anonymized data is not expensive and reporting can be automated.

An academic challenge would be to develop a classification system to identify a towns personality type whilst respecting it's individuality. This is outside the scope of this research.

Business Improvement Districts (BID's) are excellent way for retailers to have a say in managing the reputation of a towns retailing outlook – but should not get involved in anything other than that!

Town centres are not dying, they are evolving and success will rely on creativity.

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