IPM
Institute of Place Management

Manchester Metropolitan University

High Street 2030: Achieving Change

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About the Institute of Place Management

The Institute of Place Management is the professional body for people involved in making, maintaining and marketing places. As part of Manchester Metropolitan University, the Institute of Place Management is dedicated to supporting people who serve places, providing them with unbiased research, continuing professional development, qualifications, conferences, events and networking opportunities.

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Terms of Reference

The Institute of Place Management at Manchester Metropolitan University was commissioned by the Secretary of State for the Ministry of Housing, Communities and Local Government, to run five workshops to collect evidence to support the development of high street and town centre policy. The precise terms of reference were:

1. Organise and deliver five evidence workshops in communities/locations that had actually achieved change in their town centre. The evidence sessions were a mixture of presentations and interactive workshop activities.
2. Collect evidence from young people at a Teenage Market
3. Analyse the evidence from the six evidence sessions.
4. Present a report to MHCLG including overall reflections.

Executive Summary

That high streets are under challenge is now widely understood. The latest data reports a fall in high street footfall of 3.8% in November 2018, the twelfth consecutive month of falls and with a forecast further drop in December, this will be the tenth straight year of footfall decline[1]. News of retail closures continues. However, closer analysis of footfall data demonstrates that decline is not universal, some high streets are maintaining or even increasing footfall levels[2]. This is interesting because the basic components of a high street are fairly standard (e.g. shops and services), their function is a common one, to serve the needs of their catchments, and all high streets are the responsibility of a local council. So why do some thrive whilst others struggle?

This report takes a people and place-based approach to answering this question. Although high streets have been widely written about in the media and numerous reports, this report was commissioned to support the work of the Minister for the High Street, Jake Berry, and the Expert Panel he has appointed to look at the future of the high street. It has been prepared by the Institute of Place Management at Manchester Metropolitan University, who organised six interactions with local high street users in Holmfirth, Altrincham, Bristol, Shrewsbury, Aldershot and at the Teenage Market in Bolton. These interactions took the form of three-hour workshops in the five towns and on-site interviews and observation in the Teenage Market. This report summarises the views of several hundred participants who kindly gave their time to make their views and experience of high street issues known. Our participants included people of all ages, across a variety of centres, who shop, work, visit, access services, eat, drink, live, exercise, entertain, run businesses, learn, trade, manage, or frequent the high street. We want to thank them all for sharing their insight so freely.

In determining the choice of locations, we wanted to cover different regions, to hear from different town types, and to go to places where different actors were engaged in making a positive change in their centre. In each case we heard from some of the key people who had been involved in changing

[1] Springboard Insight Reports available at https://www.spring-board.info/reports/

[2] Millington, S, Ntounis, N, Parker C and Quin, S, Multifunctional Centres: A Sustainable Role for Town and City Centres, Institute of Place Management, Manchester Metropolitan University.

their town centre over recent years. Some were community volunteers, some were local authority members or officers, some owned or worked in SMEs, others worked in larger businesses, some were involved in Business Improvement Districts and others represented other types on place management partnership. Regardless of their sectoral affiliation, they helped set the scene in each location and gave a detailed, local perspective. The Institute provided data and insight into national and global trends that were impacting the high street. Then the discussion began.

Perhaps the first thing to say is that participants were enthusiastic about their high streets. Many had criticisms and concerns about aspects, some were fearful, but we were inundated with ideas about future activities on high streets and about the type of changes that were required. What was equally clear, was a real awareness of many of the issues that could hinder or prevent these aspirations being achieved. Many of the people attending had worked to deliver town centre projects in the past, and so had first-hand understanding of the complexity involved. Not only did local people have an accurate knowledge of the problems in their centre, they also had the solutions.

The report provides details of the state of play in each of the centres, the different approaches adopted and an insight into the outcomes. It explores the different, though in some cases similar, attractions that local people thought important enough in their town centre to want to retain in the future. These were such things as independent shops, community atmosphere, music venues, key service provision, markets, leisure and entertainment, good public transport, heritage, and some unique features, that made their place distinctive (often related to greenspace or waterways). The young people interviewed on the Teenage Market were equally supportive of many of these attractions, including food, leisure and entertainment offers, public transport access, and the improved public realm.

The discussions about how town centres might change saw a requirement to create more of an experience, something echoed by young people as well. There were calls for improved accessibility that is more environmentally-friendly, new public spaces or areas, centres that better serve older people, more central services, town centre living but also places for entertainment and leisure, another view strongly expressed by younger people who also wanted greater variety with more frequent use of pop-up retail and entertainment.

It is clear that whilst retail was still seen as an important element for the future of the high street by those participating, they also saw high streets offering other activities that served the community. They were places where individual and collective experiences should happen.

We then asked participants to think about change and barriers to change. Those attending worked in groups to discuss and then rank ideas based upon their local situation. The report describes the variety of issues here. Again there is some commonality over factors like funding and local capacity for managing change, but other issues were identified such as local politics, lack of engagement, difficulties in maintaining identity and distinctiveness, how to develop effective place management, developing investor confidence and addressing negative perceptions.

The workshops and interactions provided real insight into the challenges faced by town centres. That they are worth fighting for was abundantly evident from the enthusiasm of those participating, coming from many walks of life and with many different interests in the high street. We heard some great examples of what has been achieved, witnessed, at first hand, the pride that people had in the work they had done (and saw the real excitement and enthusiasm generated by the Teenage Market). Some of these achievements have been in a relatively short time and apparently against the odds, notably the resurgence of markets in Altrincham and Shrewsbury. We heard some very exciting plans for the future, but even in Altrincham, named as Champion High Street in England in the 2018 Great British High Street Awards, the message was clear - high street success has a short shelf-life and there was no time for resting on any laurels.

That high streets are subject to so many forces of change means we cannot just hope for the best. This report demonstrates that local action can be very effective and, using the evidence collected in the workshops, we have some ideas that can help all places.

We do not want to create identikit high streets. There is no one solution. The workshops showed the variation in towns, the different stages they are at and the different issues they are facing. However, we do believe there are some fundamental principles that can apply to all places. These are:

1. Places need leadership and partnerships: these are lacking in many locations but successful place leadership through partnerships makes a real difference. Place leadership is collaborative in approach and it needs to evolve and adapt as circumstances change. It is more a network than a hierarchy but place leaders, acting together, achieve change.
2. Places need to blend local and expert knowledge: there are local and global issues that impact on high streets. In too many cases towns make wrong choices, adapting something that has worked elsewhere when it may not be appropriate for their location. Having a good knowledge of local data and performance and working with experts to understand this is critical to making wise decisions about the future.
3. Places need communication to flow: With new technologies we have no excuse not to communicate now. Information, knowledge, ideas, data, plans, achievements and problems can be shared and discussed as never before. We saw excellent examples of this from some of the workshops. Communication underlies and constantly recreates the town or city brand and the perceptions of potential visitors, investors and residents. Good place leadership actively facilitates communication.
4. Places need the input of their young people: Our high streets will soon be their high streets. Young people have a valuable contribution to make to the evolution and development or their town and city centres. We have seen their enthusiasm but we need to think much more constructively how we actively engage with them, involving them formally and informally. The Teenage Market is a model that does this, but much more remains to be done.
5. Places need to be served by place professionals: High streets are complex, contested places. We are used to the idea that a single building needs professional input from the outset: the architect, the engineer, the planner and so on, but in too many instances we have assumed that because everyone uses the high street anyone can care for it. It is clear from our workshops that place professionals now exist in some places. They have different backgrounds but they act in the long-term interest of the place, being part of the leadership, engendering trust, sourcing knowledge and communicating with all to provide professional support for place change.

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Background

High streets and town centres have been hit by what has been termed “a perfect storm”[3]. Once the beating hearts of communities, a succession of trends and shocks, from the financial crash of 2008 to the growth of internet retailing, have been undermining the performance and purpose of these important institutions. According to recent evidence presented to the Housing, Communities and Local Government Select Committee[4], in the last 10 years, footfall in town centres has dropped 17%, vacancy rates have risen to over 30% in some locations, and more than 400 multiple retailers have gone out of business.

2018 has been a year of despairing headlines about retail on the high street, but this crisis has been a long-time in the making. For over twenty years, various government reports and initiatives have attempted to stop us reaching “the tipping point, when town centres are no longer a feature of the economic landscape”[5]. Whilst there is no doubt that many of the policies and programmes that have come out of these reviews have helped improve the vitality and viability of some high streets and town centres, we are a long way from the places that people want to live, work and play[6].

Against this backdrop, the Minister for High Streets, Jake Berry, appointed a panel of experts to diagnose issues that currently affect the health of high streets. Chaired by Sir John Timpson, this panel was charged to focus more on what consumers and young people want from their high streets. This is a voice that has been previously unheard. Recent research has highlighted the difference in how consumers and retailers perceive the problems on the high street. Because retailers do not have an accurate understanding of what consumers want, they invest time and money on fixing the wrong problems[7]. Similarly, young people are often excluded from discussions about the future of the high street[8], which limits them from further opportunities to engage with their surroundings, and jeopardises the potential for high streets to be fit for purpose for future generations[9].

While consumers and young people are an important source of evidence, there is another group that has an important contribution to give, if we are going to ensure town centres and high streets cope with the challenges they face and adapt more successfully. **These are the people who have already achieved a positive change in their locations.**

The Institute of Place Management (IPM) at Manchester Metropolitan University, the professional body and learned society representing people who make better places, was commissioned to run five workshops to collect missing evidence with the explicit aim of supporting the Expert Panel and the development of high street and town centre policy. The workshops were organised by Senior Fellows of the IPM, all highly experienced at managing these types of public, town hall meetings, and supported by a team of qualified researchers.

[3] Taskforce, ‘Beyond Retail’ (2013).
[4] MHCLG, ‘Oral Evidence: High Streets and Town Centres in 2030, HC 1010’ (2018).
[5] BIS, ‘Understanding High Street Performance’ (2011); C Parker, N Ntounis, S Quin and S Millington, ‘Identifying Factors That Influence Vitality and Viability’ (2016).
[6] URBED, ‘Vital and Viable Town Centres: Meeting the Challenge’ (1994).
[7] P Turner, A Bahaj and D Teli, ‘Aspirations of Retailers and Visitors Towards the Regeneration of Declining Streets in Cities’ (2018) 4 Future Cities and Environment 1.
[8] MHCLG (n 2).
[9] Future Spaces Foundation, ‘The Future High Street: Perspectives on Living, Learning and Livelihoods in Our Communities’ (2014).

Holmfirth, Altrincham, Bristol, and Shrewsbury were the four towns initially chosen for the workshops, which were hosted by local IPM members, and fifth workshop was held in Aldershot. All the workshops were attended by members of the Expert Panel and MHCLG representatives.

The workshops covered the work already done and the work planned to make each town centre better, which provided important information to the Expert Panel. However, the workshops also covered what the latest research says about the changing high street, as this is important information for the local participants, who all gave three hours of their time to attend. A summary of the key trends covered in the workshop is contained in Appendix 1. The main part of the workshop was focused on hearing from those who use the high street in some way. What did they think of the changes that have happened? What challenges have they faced? What would make their town centre better? Given that we cannot turn the clock back, what kind of high street do they want to see in 2030? What should be done to achieve this?

The research team also visited a Teenage Market in Bolton, and interviewed the co-founder (who was 19 when he organised the first market) and 10 young stallholders. The teenage market participants were asked a different set of questions. We asked them to tell us why they were there, what they like about the market, and how it differs from their normal town centre experience. We also asked them about high streets and town centres in general, if they think high streets needed to change, and what would they like to see and do on their local high street. We also wondered if anyone had asked them for their views about the high street before, and whether they would like to be more involved in making their local town centre more appealing.

What follows is the results and analysis from the evidence workshops and visits. The report is structured in nine sections, with each section summarising results and making key observations. Firstly, we summarise the situation in each location, and we give evidence of past, present and future actions for the vitality and viability of each location, as presented by the workshop organisers. Then, we present how changes in places are based on what we frame as the three key components of place management (leadership, knowledge and communication). In the following sections, we present findings from the mapping exercise, the purpose of which was to elicit views about how participants envision their high street in 2030, and what they would like to remain the same in their centres in the next 12 years. Section six focuses on the views of young people on the high street, based on data collected from a visit to the Bolton Teenage Market, whereas section seven is concerned with the Teenage Market model, as illustrated by the co-founder of the Teenage Market franchise, Joe Barratt. Section eight presents the views of participants of what needs to change in their towns. Finally, in the last section, we draw together some high-level reflections for the Expert Panel, to assist the development of policy recommendations, to help high streets thrive now and in the future.

High street revitalisation: The view from the ground

Five locations were chosen to illustrate different approaches to high street revitalisation and different challenges: Holmfirth, Altrincham, Bristol, Shrewsbury and Aldershot. The locations represent different regions and different types of town. A brief description of each location follows, as well as a summary of what the town has achieved, and some feedback from the participants and the research team. This information was drawn from initial conversations with the workshop organisers, background information IPM held about the location, and participant feedback sheets for four of the workshops (Holmfirth, Altrincham, Bristol and Aldershot, as the Shrewsbury workshop took place alongside a town plan consultation event; therefore, this exercise would have been inappropriate for this group).

Holmfirth (28th August 2018)

Holmfirth's workshop was organised by Margaret Dale and Carolyn Anstey of Keep Holmfirth Special. They also presented the story of what has been achieved in Holmfirth as part of the workshop, which took place in Holmfirth's Adult Education Centre. There were over 40 participants, comprised of retailers, residents, community group representatives, festival and event organisers, a senior local authority representative and the local MP.

Holmfirth lies some 6 miles to the south of Huddersfield in the Holme Valley and immediately north of Holme Moss and the Peak District National Park. The town itself has a population of a little over 5,000, but with its rural catchment it totals approximately 22,000[10]. Monthly footfall ranges from 61,000 to 90,000. The relative consistency of the month to month usage means we have categorised it as a Multifunctional centre, as the town serves a variety of functions.

A former mill town, Holmfirth was the setting for filming of *Last of the Summer Wine* from 1973 until 2010. With viewing audiences peaking at 18 million, this brought it to national prominence and attracted many visitors to the town. The *Summer Wine* connection is still attracting tourists and ranks as the Number 1 thing to do in Holmfirth on Tripadvisor. However, these numbers continue to shrink, emphasising the need not only for a diversified economic base but also for ample creativity in future plans for the town[11].

Holmfirth has no railway station and road access to the south leads up to Holme Moss and the Woodhead Pass which can be blocked in winter. Regular bus services connect to Huddersfield and more infrequent services connect to Sheffield, Barnsley and Wakefield.

Holmfirth is part of Kirklees Metropolitan Borough Council, which has a population of some 437,000[12], and covers several significantly larger centres in Huddersfield, Dewsbury and Batley, as well as ten smaller towns. In Holmfirth, Holme Valley Parish Council acts as a first-tier local

[10] City Population, 'United Kingdom: Counties, Unitary Districts and Major Cities in England' (2016) <https://citypopulation.de/UK-England.html?cityid=16491> accessed 27 September 2018.
[11] Nikos Ntounis and Mihalis Kavaratzis, 'Re-Branding the High Street: The Place Branding Process and Reflections from Three UK Towns' (2017) 10 Journal of Place Management and Development 392.
[12] City Population, 'Kirklees - Metropolitan Borough in West Yorkshire (United Kingdom)' (2017) <https://citypopulation.de/php/uk-admin.php?adm2id=E08000034> accessed 27 September 2018.

government body that is working directly with Kirklees Metropolitan Council, while also facilitating local decision-making and consultation, as in the case of Holme Valley's Neighbourhood Plan[13].

What has been done in Holmfirth?

An application by Tesco in 2009 to build an out of town store was fiercely resisted by the local community and withdrawn. A second application in 2012 for a smaller store also saw significant resistance from local groups Holme Valley Business Association and Keep Holmfirth Special and others who were worried about the impact on the town, although there were also stakeholders who supported the proposal. The application was rejected with traffic being a major concern, and Tesco subsequently lost an appeal.

The planning proposal and the resistance to it, catalysed extensive community action in thinking about the future of the town. This included concerns about derelict store fronts, parking, tourism provision, retail offer, diversification of offer, and organisational requirements. There were already many community-led initiatives in the town through a Folk Festival, Arts Festival and other cultural events. There had previously been community resistance to Wetherspoons converting a former theatre/cinema that had become a bingo club in the town centre. It is now a thriving music venue (Holmfirth Picturedrome) that generates footfall. Other initiatives included regular river clean-ups and other environmental and conservation schemes. Work was also undertaken to extend community engagement and involvement and to seek views from residents and businesses, with over 4000 responses. There were many ideas but the challenge was how to turn good ideas into action with limited resources or support from outside the community.

This led the community groups in Holmfirth to look at experience in other towns and Keep Holmfirth Special joined Councils in nine other locations in research led by the Institute of Place Management to understand the factors that contributed to town centre vitality[14]. This engagement led to a series of workshops that attracted a wide range of residents and businesses, many of whom volunteered to implement some of the suggested initiatives. One result was an extensive Conservation Area Appraisal and the establishment of the Conservation Group that now has charitable status. Other groups looked at rebranding and connectivity and access. . Keep Holmfirth Special have also participated in the Bringing Big Data to Small Users project which has enabled footfall counting to take place in the town for the last two years and for sales and vacancy data to be monitored. This generates evidence that is used to inform the development of actions and strategy.

[13] Holme Valley Parish Council, 'Holme Valley Neighbourhood Plan' (2018) <https://www.holmevalleyparishcouncil.gov.uk/np/> accessed 27 September 2018.

[14] Parker and others, 'Identifying Factors That Influence Vitality and Viability' (n 3).

What happens next in Holmfirth?

People in Holmfirth have a genuine interest in the town and an enthusiasm for ensuring it remains successful. There was a shared feeling of ownership amongst those present at the workshop; the large proportion of members of local action/community groups in attendance acting as testament to this. In addition to a desire to see footfall increase and Holmfirth's vitality to improve, there were concerns raised over the impact of new housing (plentiful yet not necessarily affordable), and the associated knock-on effects this is having on increased traffic in the town. There was a suggestion that local Council policy, under direction from central Government, may be contributing to these problems. There was a consensus that the market in the town should play a key role in any future plans for Holmfirth, with a suggestion that it is currently under-utilised. Festivals and events/cultural and artistic activities was a recurring theme, with attendees suggesting that the town can benefit from more of this type of activity. Attendees also felt that the town would benefit from providing more jobs to local people, the implication being that more people working in Holmfirth would equate to more people living in the town, and subsequently more people using the town for goods/services.

As with Altrincham (see below), there is a tremendous level of engagement locally in Holmfirth, and a real passion amongst the community to make Holmfirth successful. However, again as we saw in Altrincham, there is perhaps a lack of cohesion amongst the many groups/organisations. If this could be developed, with disparate efforts becoming more collective, it would likely result in a greater impact on the town.

The overarching sentiment of attendee responses was an unsureness of where they should go from here, with those present at the workshop keen to build on progress to date, yet seemingly unsure how this would be best achieved.

Altrincham (4th September)

The Altrincham workshop was organised by Penny Bell, former Principal Officer for Town Centres at Trafford Council, and Elizabeth Faulkner who is Manager of Altrincham Unlimited. Both Penny and Elizabeth presented the insight into Altrincham at the workshop that took place in Altrincham Town Hall. They were joined by Matt Colledge, former Leader of Trafford Council, who chaired Altrincham Forward, the public/private partnership credited for kick-starting the regeneration of the town. Attendees included BID and local authority representatives, retailers and other businesses, residents, community, civic and business group representatives.

Altrincham is some 9 miles south west of Manchester City Centre. It has a population of 55,000[15] but serves 75,000 residents and 20,000 workers[16]. Average monthly footfall ranges from 527,000 to 725,000. The relatively stable profile of footfall through the year means we have classified it as a Multifunctional Centre, although the town does see a Christmas peak, so does still have a fairly significant retail function.

A market town since 1290, the town population grew rapidly in the second half of the 19th century following the opening of railway lines that attracted industry and commuters. The post-war period saw extensive redevelopment of the town centre and further population growth.

[15] City Population, 'United Kingdom: Counties, Unitary Districts and Major Cities in England' (n 8).
[16] Trafford Metropolitan Borough Council, 'Trafford - First for Town Centres'.

The town has a £19 million redeveloped transport interchange that opened in 2015 within the town centre that provides access to an extensive local bus network, direct rail links to Manchester, and acts as a terminus for the Manchester Metrolink which provides access across the city.

Altrincham is part of Trafford Metropolitan Borough Council which has a population of 235,000[17]. Altrincham is the largest town centre in the Borough but the Intu Trafford Centre, the North West's largest shopping centre with almost 2 million square feet of retail space, is just 7 miles away.

A Business Improvement District was set up in Altrincham town centre in 2016 with a five-year budget of £1.4 million and the primary objective to improve the trading environment in the town centre. The focus of activity is on marketing and events and supporting the business operating environment, including addressing parking issues, wayfinding, and supporting the evening economy.

What has been done in Altrincham?

In 2010, Altrincham made national headlines as a "ghost town" with shop vacancy exceeding 30%. This galvanised action by many traders who came together as a group, and by the local authority who provided funding and staffing resources for a local public/ private sector partnership called Altrincham Forward. Working from a shop front base and with high level support, a local project team was able to co-ordinate efforts to turn Altrincham's fortunes around and plan for the future.

In 2013, the market operation was tendered and won by a Manchester-based entrepreneur. The changes to the market with new traders, a focus on food, new trading hours and active management and marketing have led to it again becoming a vibrant hub for the town centre, and a model that other centres are now looking to emulate. Altrincham Forward, working with Trafford Council, set up a Landlords' Forum which helped to improve the appearance of vacant units, achieved an area-wide rates reduction and actively encouraged new businesses to open in the town centre through development and promotion of a successful Council loan scheme. Trafford Council invested in extensive public realm works, a programme of events and activities were developed, and a new identity for the town as 'a modern market town' was developed as part of a visioning and strategic development approach.

Adding to the redevelopment of the Interchange, the hospital has relocated to a new site in the town centre and their previous site is now being redeveloped as a multi-purpose centre and new library. Residential schemes are now under development in the centre. Vacancy rates had fallen by 73% by the end of 2017[18] (with retail vacancy under 10%). Altrincham was named as England's Champion High Street in the 2018 Great British High Street Awards.

What happens next in Altrincham?

The attendees in Altrincham shared a passion for ensuring the town remains successful, with an emphasis on sustaining and maintaining the momentum developed over recent years.

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[17] City Population, 'Trafford - Metropolitan Borough in Greater Manchester (United Kingdom)' (2017) <https://citypopulation.de/php/uk-admin.php?adm2id=E08000009> accessed 27 September 2018.
[18] Beth Abbit, 'From Ghost Town to Boom Town - How Altrincham Became the Place to Be' *Manchester Evening News* (Manchester, 18 February 2018).

Given that the town's success has been underpinned by significant infrastructure/place investment from various sources, the importance of a mix of public/private funding was cited as a key contributing factor. The overarching theme of responses was that Altrincham is doing very well, and the focus should now be on maintaining momentum, and ensuring the town remains successful into the future. Events and experience were mentioned on a number of occasions, with attendees firmly of the belief that the success of Altrincham is not only based on retail, leisure and community uses as well as the market, but also on the events that take place in town. It is these events that bring people in, and contribute to an experience that visitors enjoy and which manifests in repeat visits.

Evidently, there is a great deal of local passion for Altrincham, and a consensus that responsibility for the success the town has experienced is very much shared. Indeed, the amount of effort that has, and continues to be, contributed by the various organisations/volunteer groups in the town is testament to this. Whilst this is undoubtedly a positive – and as with Holmfirth - there was a suggestion that through continued partnership, and improved coordination, more could be achieved.

Bristol (12th September)

Jason Thorne, the Senior Project Manager for City Centre Development at Bristol City Council led the organisation of the workshop and presented the insight into what is happening in Bristol. The workshop took place in City Hall. The event was attended by representatives of the City Council and the city centre BIDs, retailers, property owners and developers, transport operators, major venue operators, business group and hospitality representatives, residents and community groups.

Bristol is one of England's core cities and the largest settlement in the south west. It has a population of 459,000[19] but serves a much wider catchment. Monthly average footfall in the heart of Bristol's shopping area ranges from 614,000 to 875,000 but with a December peak of 1.06 million. We have classified the city as a Comparison location as a result of the Christmas spike. People come to Bristol for many reasons, but retail remains a strong attractor.

The waterside location and harbour fuelled Bristol's development. It grew as a major port city through industries such as tobacco and aircraft manufacture, and is now home to a major tech cluster. As large scale major maritime activity moved to nearby Avonmouth on the Severn Estuary significant investment into the regeneration of the harbourside started over more than 30 years ago with homes, offices and leisure attractions now features of the area.

Bristol is well connected to the national motorway network, has an expanding airport, and the main central railway station is located on the edge of the city centre. A central bus station is a short walk from the Broadmead retail quarter.

Governance in Bristol city centre is by Bristol City Council, through an elected Mayor and its main offices are in the centre. There is a dedicated team focused on the strategic development of the city centre. Bristol was one of the early adopters of Business Improvement Districts and the Broadmead BID, established in 2005, focused on the Broadmead shopping area. It has recently gone through a successful ballot to extend to a fourth five year term. The BID focuses on marketing the shopping offer of the city and on enhanced cleansing and maintenance in the area. It will raise £1.5m of investment in its new term. A Bristol City Centre BID covering a much larger area was established in

[19] Bristol City Council, 'The Population of Bristol' (2018).

2017 and will bring £6m of investment to the centre. The City Centre BID aims to improve safety, improve the look and feel of the city centre, improve the welcome, promote success and act in the best interests of the full range of levy payers. There is also a destination management organisation that is Destination Bristol.

What has been done in Bristol?

St Nicholas Market was established in 1743 but after the Second World War, bombing in the city meant a new retail centre was developed centred around Broadmead. This was constructed in the 1950s and subject to various extensions, including the Galleries, and pedestrianisation in the 1980s. In 1998, nearly 1 million square feet of retail space was opened in an out of town mall at Cribbs Causeway, less than 6 miles from the city centre. This has since grown to include retail parks and leisure facilities with further development proposed. The retail offer in the centre was considerably extended in 2008 with the opening of Cabot Circus, bringing 1 million square feet of retail and leisure facilities, and the development of shopping and dining in Quakers Friars.

The Council has undertaken extensive public realm and transport schemes to reduce congestion and improve environmental quality. Significant investment in culture, marketing and events by the Council and the BIDs is providing new draws for residents and visitors. Large-scale development is now underway around Temple Meads Station and in other areas of the city centre. The Council continues to be at the forefront in looking to improve air quality and to develop the digital infrastructure for a smart city. Consultation work is now underway on the future role of the city centre that will lead to a new revitalisation plan. Alongside this, work is underway to enhance and manage a vibrant and diverse night-time economy.

Bristol City Centre is a major employment centre, with over 105,000 jobs, and attracts the highest proportions of working age people in the area (90%). Bristol has seen a large increase in population since 2002, which can be attributed to a number of factors including a significant increase in net-international migration and increase in births. The resident population of Bristol continues to increase, and it is estimated that the city will have a population of more than half a million residents by mid-2027[20].

What happens next in Bristol?

Attendees at the workshop were very interested in how people move around Bristol – indicating that there was a concern with walkability and connectivity in the city centre. There was also a suggestion that traffic was a continuing problem in the centre, with congestion and air quality cited as areas for improvement. Planning concerns were prominent in responses. Attendees suggested that redevelopment of the centre should be conducted with careful planning, taking into account the pace of change of urban areas, with sustainability central to these decisions. Connected to this, there was a general consensus that the centre would benefit from more mixed-use development, with residential and cultural/entertainment use given equal footing alongside commercial. Finally, the attendees suggested that Bristol's independent traders and unique character should be a prominent aspect in any conversation regarding the city's best features/points of differentiation.

[20] ibid.

Perhaps unsurprisingly, with Bristol being a major city as opposed to a smaller town, some of the reasons given for attending the session were more general interest oriented, lacking some of the more inherent local passion that we experienced in other places. There was a more general interest in retail trends and the future of the high street, coupled with an interest in larger scale development activity. Some attendees gave very business-centric responses, reflective of the impact these things could have on their personal concerns. As such, there was a distinctly different feel to the workshop than that experienced in the smaller towns. That said, again the turnout and the enthusiasm for the session was encouraging.

Shrewsbury (19th September)

This workshop formed part of a wider event on the Big Town Plan which was co-hosted by Shropshire Council, Shrewsbury Town Council and Shrewsbury BID, each of whom spoke at the event about the work to develop the Plan. The meeting was in St Mary's Church in the heart of the centre. Those attending included local residents, retailers, community, civic and business group representatives, the Local Enterprise Partnership, educational providers, transport operators, property owners and venue operators.

Shrewsbury is the County Town of Shropshire, lying just 9 miles from the Welsh Border. The town centre is almost completely surrounded by a loop of the River Severn. Shrewsbury has a population of 73,000[21]. Monthly average footfall in Shrewsbury ranges from 760,000 to 920,000 with a spike in December of around 1 million. We have classified Shrewsbury as a Comparison centre as a result. As in Bristol, shopping is still a major draw for the town.

An historic market town that retains its medieval street pattern and 660 listed buildings, access to the centre of Shrewsbury from the east, south and west lies across just two road bridges. The town grew on the back of the wool industry and its access to the river. As a county town, it was an important civic, religious and education centre and retains its castle in the town centre.

Shrewsbury railway station is in the town centre with six routes providing access across Wales, to the north west and west midlands. The town is on the A5, with fast links to the main motorway network. A central bus station provides services across the county and to surrounding towns.

Shrewsbury is part of Shropshire Council which was established as a unitary authority in 2009. It is the largest town in a local authority area that covers over 1200 square miles. A new Town Council was established for Shrewsbury in 2009. In 2014 a town centre BID was established which has just successfully gone through renewal ballot. The BID will see £2million of investment over 5 years and works across three areas: 'promoting and animating', 'supporting and enhancing' and 'representing and influencing'. The latter includes work on The Big Town Plan to ensure the success of the town centre.

What has been done in Shrewsbury?

The Pride Hill and Darwin shopping centres are centrally located and together with the adjoining 1960s Riverside centre provide 41,000 sq. metres of retail space. The centres have been refurbished

[21] City Population, 'United Kingdom: Counties, Unitary Districts and Major Cities in England' (n 8).

over time and account for 48% of retail sales in the town[22], but they are now dated. In 2018 they were acquired by Shropshire Council for £52 million. Much of the other retail offer in the town is in unit shops on historic streets, including a House of Fraser store that is set to close soon. Shrewsbury has an indoor market which has been transformed in recent years and was named Market of the Year in 2017 by the National Association of British Market Authorities, and a monthly Farmers market has been reintroduced to the market square. There is extensive out of town retail on various retail parks.

Shrewsbury has long been renowned for its planting and has several times won national level Britain in Bloom awards. This is very visible in the centre. Marketing of the town as a destination is done through the 'Original Shrewsbury' brand, highlighting the town as a place of 'one-offs'. Work started this year on substantial upgrades to the public realm in the town centre, with resurfacing of the central Pride Hill to be followed by upgrades for High Street. This is funded under the Integrated Transport Plan with support from The Marches Local Enterprise Partnership.

The various agencies in Shrewsbury have been working together to secure the future of the town. In 2014, they initiated Team Shrewsbury to enhance the management of the public realm. This co-ordinated the work of the two Councils, the BID, police, and shopping centres and involved schools, residents' groups, transport operators and others.

In 2017, Shropshire Council, Shrewsbury Town Council and Shrewsbury BID initiated a public consultation using shop premises in the town centre to gather views on what the town should be like in 2036. With over 2,500 responses, this led to the Big Town Plan which reimagines the town centre and looks at how it is integrated into the wider town. This was subject to further consultation in the summer of 2018 and these comments are now being reviewed. The Big Town Plan would see development of the town across four key themes 'Rethinking Movement' 'Supporting Vitality Life and Mix' 'Creating a place for enterprise' and 'Nurturing Natural Shrewsbury', and the delivery of an ambitious and transformative project 'The Big Connection' which would link the restored Flaxmill in the north to the West End and include the redevelopment of three shopping centres

Aldershot (12th November)

The workshop was organised by David Phillips, Town Centre and Cultural Manager with Rushmoor Borough Council, and he made the presentation about Aldershot at the workshop. The venue was Princes Hall. The event was attended by members and officers from Rushmoor Council, civic and community group representatives, the Aldershot Garrison Commander, a transport operator, retailers, education providers, and a football club representative.

Aldershot is located in the extreme north east of Hampshire, some 32 miles south west of London. It had a 2011 Census population of 36,321[23]. Over 6,000 of the population in 2011 were Nepalese and that number has risen since then. There is no high street footfall counting undertaken in Aldershot. In the centre of Aldershot is the Galleries shopping mall which has been empty for some 10 years. If the units in this are counted, then retail vacancy in the town is 21%. Even excluding the Galleries, the vacancy rate at 14% is above the national average (vacancy data presented at the workshop by Rushmoor Borough Council).

[22] JLL, 'Charles Darwin and Pride Hill Shopping Centre' (2018) <https://property.jll.co.uk/rent-retail-shopping-centre/retail-shopping-centre-rent-shrewsbury-sy1-1pl-6934> accessed 27 September 2018.
[23] Rushmoor Council, https://www.rushmoor.gov.uk/CHttpHandler.ashx?id=11196&p=0

Adjacent to Aldershot town centre is Aldershot Garrison which has been 'home to the British Army' since 1854. With approximately 10,000 residents, the army garrison remains an important influence on the town. Aldershot was only a village when the army first arrived, though it had held a regular market from the 17th century, and so nearly all its development is from the Victorian era onwards.

Aldershot has fast and semi-fast rail services to London Waterloo, with fastest journey times in peak periods being around 46 minutes. The M3 is a few miles to the north. There is a bus station adjacent to the railway station which provides services throughout the area.

Aldershot has been part of Rushmoor Borough Council since 1974, which has an estimated population of 95,800 in 2017. Farnborough is the other principal town in Rushmoor, just 4 miles from Aldershot. Farnham is a similar distance away and the far larger town of Guildford is just 10 miles distance. In 2015, initial feasibility was undertaken as to whether establish a Business Improvement District in Aldershot but the response was thought not sufficient for that to proceed.

What has been done in Aldershot?

Since 2008, Aldershot has seen the loss of a number of major multiple retailers in the town centre, including Marks & Spencer, Next, Burtons, and Topshop. In 2012, a £65 million leisure-based complex, Westgate, comprising a cinema and restaurants and a 93,000 sq ft Morrisons supermarket opened on the edge of the centre, though some of the restaurant occupiers have now closed. This development also connects to a 100,000 sq ft Tesco superstore that lies further away from the centre. In 2015, LEP funding was secured for public realm improvements that saw new paving, benches and tree planting. The Council brought the operation of a small weekly market in-house in 2015 and has supported a shop front improvement scheme. The Council is now taking steps to address anti-social behaviour and rough sleeping in the town centre. In 2016, the Council adopted Supplementary Planning Guidance for the town centre.

A series of consultant appraisals have suggested that Aldershot, at around 720,000 sq ft retail area, has too much retail space for a town of its size (information presented by Rushmoor Council at the workshop). There are plans for significant housing development around the town, including 3,850 homes on former army land. The Council is making use of the Housing Infrastructure Fund to promote residential development in the town centre and has undertaken property acquisition in the town centre, most recently acquiring the former M&S store. The Council is proposing to establish new partnerships to take forward some of this development. A number of other ideas are being taken forward to encourage 'meanwhile' uses in the centre and to establish a new Games Hub as part of the development of a 5G regional centre of excellence. Looking further forward, the aspiration is to have a vibrant night-time economy and cultural offer to complement retail.

What happens next in Aldershot?

The Council members were very enthusiastic about the future development opportunities – they are acquiring sites and have significant Housing Infrastructure Funding to help them do this. They have accepted that there is too much retail space in the town, and there are proposals in the Supplementary Planning Guidance for new housing and leisure development in the centre as well as new housing development adjacent to the centre that will create renewed demand for shops and other services in the centre. There is a vision for "Farnborough and Aldershot Town Centres in 2028" that talks of their "unique heritage and histories" and wants them to be "family-friendly town centres" that complement their "respective global brands". However, as these aspirations apply to both town centres they are very generic and not any more specific in the Supplementary Planning Guidance. There was discussion at the meeting about levels of apathy, and relationships between the Council and the wider community – but there was no agreement as to who was apathetic, or how to engender a more constructive relationship across different stakeholder groups. A Business Improvement District had been mooted, but failed at feasibility stage (but it was not clear why). There was consensus that people tended to talk to the town down. Resident representatives suggested that the Army has abandoned the town – but this perception was not shared by the Garrison Commander, who pointed out they still have a community of over 10,000 living in Aldershot.

Aldershot is well-known as the 'home of the British Army' – but apart from one gun at the station there is little clearly discoverable in the town centre that makes reference to this heritage. This seems a missed opportunity. Likewise, Aldershot has a large Nepalese community and there are now Nepalese shops and leisure facilities but nothing is made of this opportunity in the strategy. Despite the recent investment in public realm works, the town looks rundown and the environmental quality is poor. The 2012 Westgate appears quite bleak and exposed. Whilst there are new developments planned, these will take 3-5 years to completion. As engagement between the Council, the residents, the business community and other stakeholders is so far limited, it is not clear that the developments planned are going to maximise the potential for the centre. There is much work to do to change Aldershot for the better.

What achieves change?

Whilst the towns discussed are very different, there are some key themes we would like to discuss here, relevant to the management of change in locations. Later sections deal with many of the physical or supply-side factors associated with the changing high street (e.g. retail, property, technology). However, in this section we start by highlighting how the people the expert workshops visited organise themselves to affect change, and we examine these changes by categorising the practices that have contributed to their achievements.

These practices are based on the most comprehensive study of place management undertaken in the UK[24], which identified the three key components of good place management being *leadership*, *knowledge* and *communication*. We then compare these components to sources of information we have presented about each town; and our previous experience of working with the people involved, either through one of our High Street projects (e.g. High Street UK 2020) or generally through our work as the sector's professional body.

Leadership

First, whilst all locations are subject to the same statutory planning, management and governance models, the workshops show this is no guarantee of *place leadership*. In fact, whether change is being led or who is leading change was completely different, in every location we visited; so too were the mechanisms for funding change and the sectoral affiliations of the protagonists[25]. What is

[24] Nikos Ntounis, 'Place Management through Different Lenses' (Manchester Metropolitan University 2018).
[25] JA Coca-Stefaniak, C Parker, S Quin and others, 'Town Centre Management Models: A European Perspective' (2009) 26 Cities 74.

common to Altrincham, Holmfirth, Bristol and Shrewsbury is that the leadership in these places has transcended from the actions of individual leaders, organisations or sectors to a series of more collaborative movements, in other words, *partnerships*. The partnerships focus on the actual work of doing leadership[26], rather than sticking to an outdated, top-down hierarchical structure that just administrates place.,

As already mentioned, in Altrincham, Holmfirth, Bristol and Shrewsbury very different partnerships are instrumental in delivering change. The degree of formality for the partnership can vary (in other words partnerships do not always have a legal form) and the funding for the partnerships can come from various sources (in other words we cannot define them as 'public sector' or 'private sector' etc.) This is illustrated in Figure 1.

In the case of Holmfirth, the impetus and action is led by an informal group of volunteers, 'Keep Holmfirth Special', funded through the investment of time with support from the private sector, and through local initiatives and events. In the case of Altrincham, the regeneration was initially led by the public sector (Trafford Council) before a public/private partnership was formed (Altrincham Forward) and then disbanded when Altrincham Unlimited, the Business Improvement District, started. The BID is entirely privately funded, though local authority infrastructure investment continues.

In Bristol, the City Council plays a more traditional leadership role, but works alongside the city's Business Improvement Districts and other groups, on many day-to-day initiatives and ad hoc projects, that are often co-funded. In Shrewsbury, the County Council, The Town Council and the BID are currently working together to deliver the Big Town Plan, but with much of the funding for this activity coming from the public sector. All these approaches have their strengths and weaknesses. There is no one leadership model that will work in all towns. Instead, the model emerges in each location, reflecting the place's culture, capacity and history.

In contrast to Altrincham, Holmfirth, Bristol and Shrewsbury, in Aldershot we could not see evidence of effective partnerships engaged in place leadership. Whilst there was some shared understanding of what the town's problems were, the participants blamed other groups and organisations for these problems. There was no feeling of collective responsibility. To bring about any change in Aldershot, the Council can only rely on its statutory powers, developing plans and visions and so on and commissioning development. This top-down and hierarchical approach to managing change is not place leadership.

Instead, place leadership needs to be conceptualised as a source of energy and the capacity to bring about change in a *collaborative* fashion. Sometimes it may be more concentrated in one organisation (like a local authority) or one partnership (like Keep Holmfirth Special), but

It is never wholly contained in one structure. Place leadership is always diffused across different people, and different organisations as was more apparent in Bristol and Shrewsbury. What is important is that partnerships emerge that facilitate the collaboration of these individuals and organisations and drive change, thus highlighting how strong leadership can be established in a pluralistic environment[27].

[26] Dennis Tourish and Brad Jackson, 'Guest Editorial: Communication and Leadership: An Open Invitation to Engage' (2008) 4 Leadership 219; Barbara Simpson, Linda Buchan and John Sillince, 'The Performativity of Leadership Talk' [2017] Leadership 174271501771059.
[27] Ntounis (n 21).

Extent of Formality

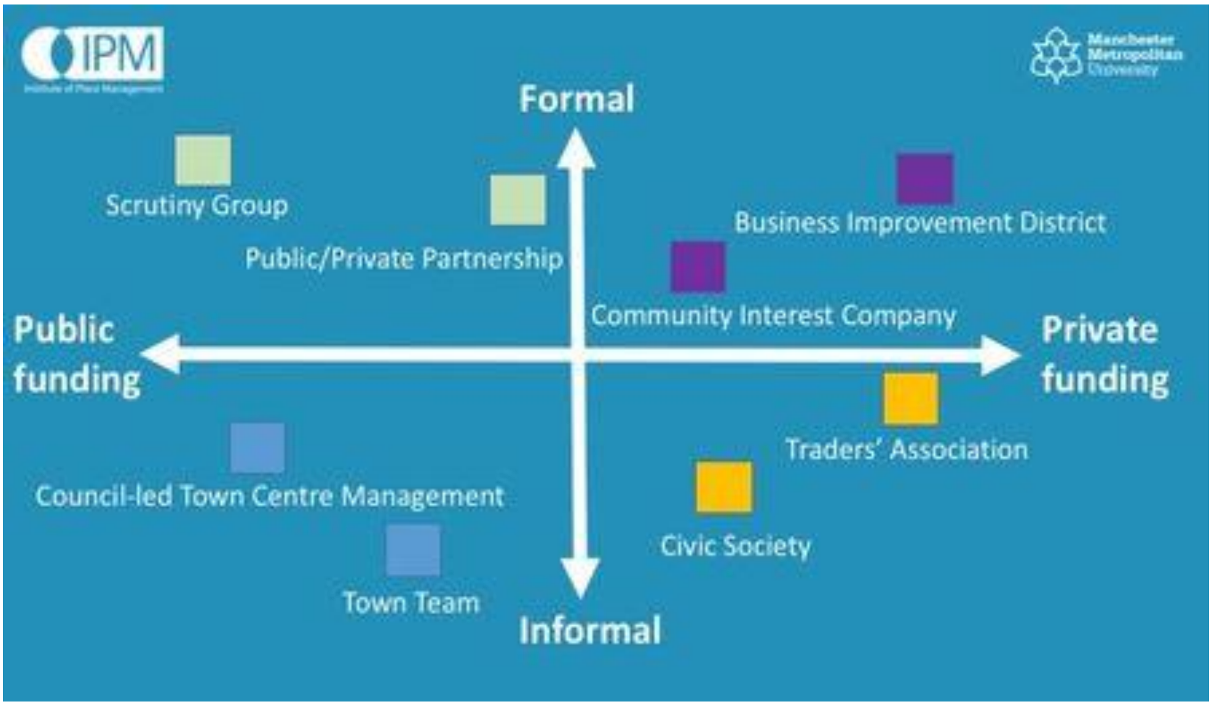


Figure 1: Urban management groups – structures and degrees of formality[28]

It is also important that place leadership is regularly reviewed, and models changed or adapted, where necessary. For example, in Altrincham, since the council-led strategic public/private partnership, Altrincham Forward, has been disbanded, there is no such body to coordinate the activities of the private-sector groups, like the BID, and the voluntary-sector groups, like the Civic Society. This, alongside with the downgrading of place management in Trafford Council to a very operational function, means that if tensions between groups arise, there is no council employee perceived senior enough to arbitrate.

Whilst place leadership can be defined as a source of energy and capacity to manage change, spread across various groups in a particular location, the people that display place leadership *behaviours* are very different to the type of leaders or 'heroes' we are used to seeing in corporations or even in films or novels. In four of the five locations (Holmfirth, Altrincham, Bristol and Shrewsbury), the workshops were hosted by a member (or members) of the Institute of Place Management. These are individuals who have signed up to a professional code of conduct that expects them to work collaboratively and in the strategic or long-term interests of locations. They do not seek the limelight; instead they network, they build trust, they stay attached and embedded in the places they are working to improve. They are very aware of power relationships and power imbalances. These 'place professionals' are crucial to the success of a location, they can mobilise action quickly; for example in Holmfirth, Margaret Dale had just over a week to organise the workshop which attracted a very diverse group of over 40 attendees. They are reflexive, they help steer stakeholders to a consensus, but they also have values – they are widely perceived to be acting in the interests of the location, not pursuing their own personal agenda. They realise the potential of place

[28] Coca-Stefaniak and others (n 22).

management as a transformative process, and they nurture leadership practices that are focused and targeted towards successful organisation[29].

Knowledge

In this, section we want to raise the importance of knowledge as being essential if a place is going to successfully adapt to change. In Holmfirth, Altrincham, Bristol and Shrewsbury, time has been spent gathering local data on trends, on key performance indicators, such as footfall and vacancy rates, as well as qualitative feedback through consultations and surveys. In all four cases this data has been important in accurate repositioning of the centres and ensuring plans and visions are rooted in the 'realities' of the place. They have not just blindly followed what other locations have been doing. They have collected their own information, which is often not easy, analysed it and made important decisions and ambitious plans, as in the case of Shrewsbury's whole new town plan. Altrincham has managed to reinvent itself as 'the modern market town', Holmfirth has focussed on what makes it special to residents, not just visitors, and Bristol has had a long history of nuancing its support to all its 47 retail centres, through collecting and sharing regular data. In contrast in Aldershot, though several consultants have looked at the changing retail offer, footfall counting and other data gathering is not undertaken and the absence of concrete information definitely contributes to the different perceptions about the town.

Nevertheless, data on its own does not contain any answers. It is the creation of valuable place-based knowledge, which resides in shared understandings between people and experts regarding the location, that is deemed more important for places, as it is a shared practice that supports the process of place management. During the practice of creating specific place knowledge, data is shared and then various stakeholders work together to interpret it and give it meaning. This process includes involving expertise from outside the location. The High Street UK 2020 and Bringing Big Data to Small Users projects enabled knowledge to be shared from the IPM research team with locations, and vice versa. A defining feature of the locations we have visited is their willingness to invite researchers into the town, share honest information (not just 'best practice') and listen to the feedback or results from the IPM team. The workshops organised for the Expert Panel were two-way affairs. The results of the research are shared in this report, but we also shared up-to-date knowledge of high street trends, footfall data and so on with the participants. This adds to the collective knowledge in the locations, and, in turn, makes the stakeholders more confident in their decision-making.

In bigger cities, like Bristol, it is unrealistic to expect all stakeholders to work together in one group. Therefore, existing professions, like planning, have a lot of knowledge to offer in terms of engaging communities, methods of consultation and developing shared visions and strategies. Creating mechanisms by which groups can come together for certain purposes, can be an effective way of sharing knowledge. This is certainly working in Shrewsbury; however, delivering a plan is not, in itself, delivering any actual change. To make plans and visions reality, the knowledge of those responsible for managing specific locations in the city, like Business Improvement Districts or those that understand specific functions, like businesses associations or property owners, is needed if plans are going to become reality. It may well be easier for different groups to work together at the 'ideas stage' rather than in the delivery or even maintenance stages, when more homogenous groups may be more effective.

[29] Ntounis (n 21).

The solution to all place problems relies on a mixture of knowledge that comes from both outside and inside the town centre. Attempting to understand all the complexities of town and high street change is outside the capabilities of any one town. Likewise, expecting 'experts' or consultants to understand the peculiarities and context of any particular location is unrealistic. Effective place management relies on pooling or blending both general and local knowledge.

In too many places, top-down decision making, without integrating the knowledge of residents or businesses has led to a set of generic visions and unconvincing plans. Across the UK's high streets, it is not hard to find development mistakes that, with more scrutiny from the wider-community and a higher standard of technical knowledge on the part of planners, could have been avoided.

Communication

Finally, the third contributory factor explaining the relative success that some of the workshop towns have had in adapting to change is *communication*. In Altrincham, Holmfirth, Shrewsbury and Bristol, styles and approaches vary widely, but people work hard to keep others informed of progress, problems and changes of plans etc. Whilst typical local authority approaches to communication are important in terms of accuracy and following due process, the way communication flows in practice is very different. Social media, face-to-face meetings, WhatsApp groups, personal phone calls, texts, Facebook groups and noticeboards are all channels of communication used widely, alongside more traditional forms like meetings, local newspapers and council reports. No one organisation can own or control all the communications about a place. All organisations involved in place management suffer from perception bias. The Business Improvement Districts can be perceived as too 'private-sector', their messages too polished, or too defensive and inauthentic. The local authorities can be perceived as too vague, too nervous to commit to saying anything in particular, or, in some cases, untruthful or dishonest. In Aldershot, the Council representatives were disappointed that feedback from residents on doorsteps did not recognise the work the Council had done in the town. The discussion at the table highlighted that this was probably because there were no co-ordinated communication mechanisms to disseminate information.

In the case of Keep Holmfirth Special the group was perceived as insignificant by their local authority, unworthy of even a reply to the numerous emails they sent trying to get them engaged or interested in their town centre activities. These power imbalances between organisations are often a barrier to communication.

Where organisations are poor at communicating, place professionals are a trusted source of communication, even if they work for an organisation that is not, or has not, been trusted. A good place manager can amplify certain messages, or call into question others. In addition, they are very good at communicating regularly and clearly; being readily contactable and able to adapt their style and language to suit different users. **They also listen.** Without effective communication partnerships cannot enlarge or persuade others to sign up to a collective aim or vision. With the poor communication between Holmfirth and Kirklees Council, the local action taken in the town is in danger of being 'wiped out' (literally) by a road-widening scheme. This is a very different situation to when we started working with Holmfirth, when Kirklees Council employed an experienced place manager, who acted as the conduit between the council and the town. Local authorities always need mechanisms to engage and listen to their wider community. We do not mean through one-off consultations and surveys (although these can be very useful), we mean to ensure communication can flow. In Aldershot there is little engagement from the council with businesses or the wider community because there is no established mechanism to do this.

Place communication is not only the day-to-day flows of information between stakeholders, it also shapes the perceptions or image of the place – sometimes referred to as the 'place brand'. Like leadership and knowledge, a place brand is a collective message built up from many sources. It cannot be controlled or created overnight, instead it is built up gradually from a plethora of missives, some positive, some negative, some congruent, some contradictory. Eventually a message is formed. The process of helping these types of meta-messages or brands form is common to our workshop locations. Altrincham is the modern market town, Holmfirth is special, Shrewsbury is original and the birthplace of Charles Darwin, Bristol is independent, Aldershot is the home of the British Army. These are not inauthentic slogans stuck on a town or city by a consultant, but common perceptions held by both those within it and those external to it.

With social media it is possible to 'listen' to the communication flows in a location – in terms of how things get done, and who works with who – as well as see how the location communicates externally, how it is presented and how it is perceived. In Aldershot, it was agreed that people talked Aldershot down. We think this reflects the absence of place leadership, knowledge and poor communication. Whilst there is much to change in Aldershot, incremental improvements could be tracked through some quite rudimentary sentiment analysis.

What about the future?

As part of the MHCLG evidence workshops, participants took part in a mapping exercise, which was designed to elicit their views about what they currently like most about their high street, and the things they would like to see change by 2030. Participants were split into groups of approximately 8-10, with an IPM researcher sat with each group to observe discussions and facilitate the activity. The group was first directed to draw a rough map of the high street in the location the workshop was taking place on A1 flipchart paper, considering factors such as boundaries, size, and key features. Second, they were asked to write onto post-it notes what they like most about the high street, and would thus want to see remain there in 2030, which they then placed onto their map. Third, participants were instructed to write onto post-it notes what they would like to see change in their high street by 2030, which they also added to their map. And finally, one member of each group delivered a short presentation explaining the key features of their finished map to the other groups in the room. Participants were encouraged to discuss their thoughts and feelings about their high street with other members of their group throughout the task, and the IPM researchers sat with each group took detailed notes. Key factors were identified in the maps and research notes, which are presented in the tables below, by location. In addition, these factors were also compared with factors existing research already identifies as making high streets and town centres more vital and viable (Parker et al., 2017).

Holmfirth

As detailed in Table 1 below, regarding what participants would like to remain in Holmfirth by 2030, some commonalities arose; independent traders, the community atmosphere in the town, the Picturedrome (music venue), and the greenspace/river areas. Participants wanted to see better accessibility into Holmfirth, a more pedestrian-friendly high street, with less congestion issues, and an enhanced sense of 'experience' in Holmfirth by 2030. Furthermore, when constructing the map of Holmfirth high street, it became evident that participants had difficulties locating a central hub; and it thus emerged from discussions around this task that they would like to see one by 2030 (Image 1).

Things to remain in 2030	Relate to vitality and viability factors	Things to change by 2030	Relate to vitality and viability factors
Independent traders	Chain vs independent	More of an 'experience'	Experience
Community atmosphere	Experience / networks and partnerships	Better accessibility	Accessibility
Music venues	Entertainment and leisure / experience	Less cars and congestion in the centre	Walkability
Maintain the countryside	Recreational space	Need for a central hub	Appearance / Experience

Table 1. Holmfirth mapping exercise

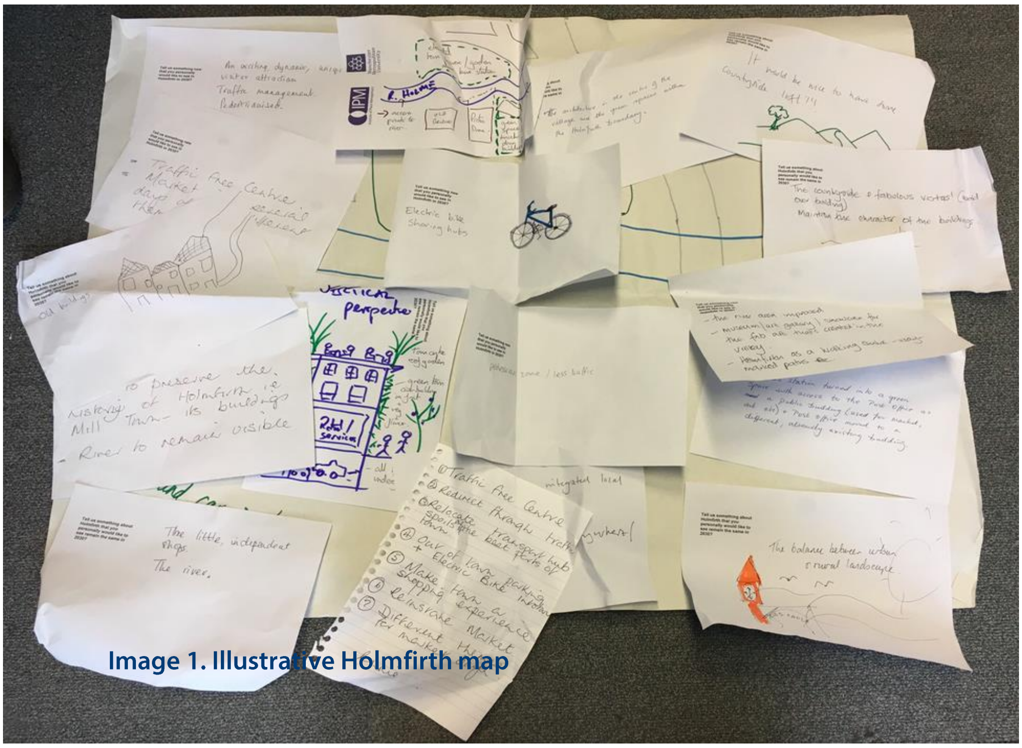


Image 1. Illustrative Holmfirth map

Altrincham

Participants would like the diverse entertainment and leisure offering (the market; ice rink; leisure centre; cinema; gym; and food and drink provision), accessibility options (range of public transport), and key services (the hospital and library) to remain in Altrincham by 2030 (Table 2). Whilst participants wanted to see more environmentally-friendly public transport options and fewer cars in the centre, more residential options, further public and greenspaces in which to dwell, and a more diverse entertainment offer (such as the development of a coffee culture) in Altrincham by 2030 (Image 2).

Things to <u>remain</u> in 2030	**Relate to vitality and viability factors**	**Things to <u>change</u> by 2030**	**Relate to vitality and viability factors**
Diverse entertainment and leisure offer	Entertainment and leisure	More environmentally-friendly transport options	Accessibility / walkability
The market	Entertainment and leisure / anchors	More residential	Liveability
Key services (hospital, library etc.)	Liveability	More public areas and greenspace	Recreational space
Range of public transport	Accessibility	More diverse entertainment offer	Entertainment and leisure
		Adapting the centre for older people	Liveability

Table 2. Altrincham mapping exercise

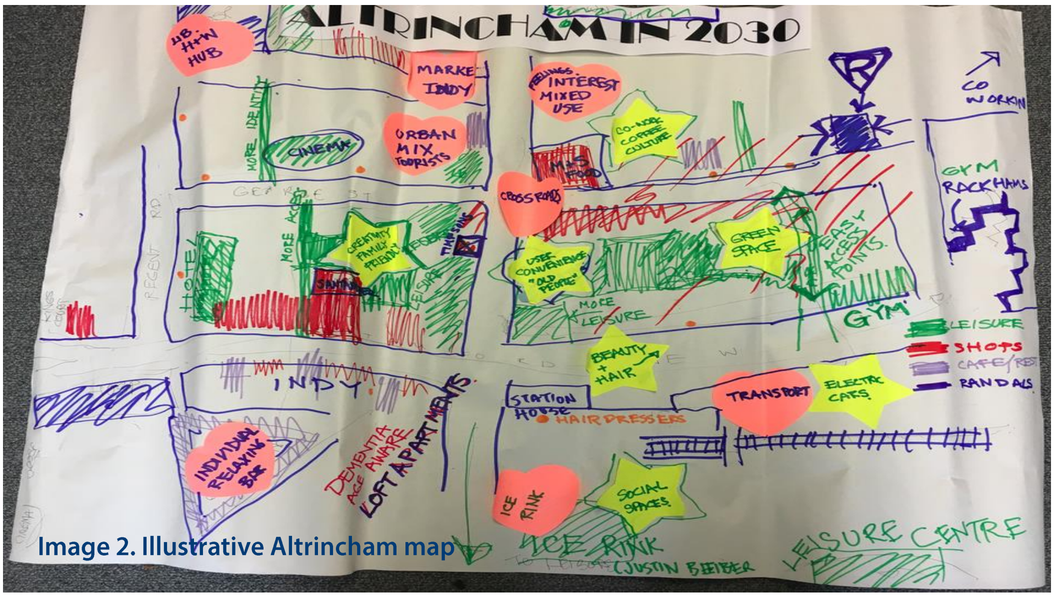


Image 2. Illustrative Altrincham map

Bristol

As found in Table 3, consensus arose around participants wanting the good mix of independent traders (shops and food), greenspace and the harbourside area, and the diverse food and beverage provision to remain in Bristol in 2030. In contrast, participants identified that they wanted to see more environmentally-friendly transport options and fewer cars in the city centre, better connectivity across the city, particularly from Temple Meads into the centre, further open spaces to dwell in, and more key services (such as healthcare) in Bristol by 2030 (Image 3).

Things to <u>remain</u> in 2030	**Relate to vitality and viability factors**	**Things to <u>change</u> by 2030**	**Relate to vitality and viability factors**
Independent traders	Chain vs independent	More environmentally-friendly city	Liveability
Food and beverage offer	Retailers / diversity	Better connectivity	Walkability/ Accessibility
The harbourside	Recreational space	More open spaces	Recreational space
		More key services	Liveability

Table 3. Bristol mapping exercise

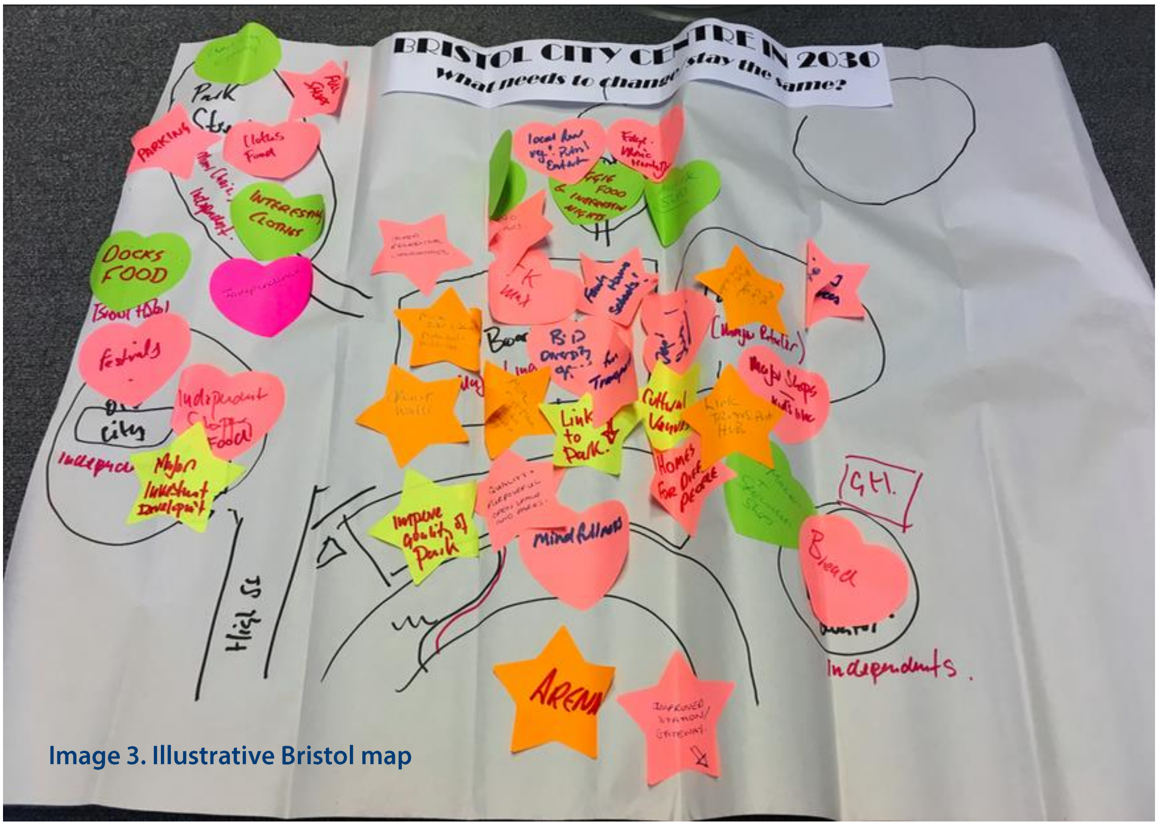


Image 3. Illustrative Bristol map

Aldershot

There were commonalities as to what participants would like to remain in Aldershot by 2030, as detailed in Table 4 below. These included key high street retailers (e.g. Boots and Lidl), the train station, garden areas, and also the appearance of the Victorian high street architecture. Participants, however, wanted to see better connectivity within and leading into Aldershot, with the introduction of traffic-free zones, more integrated transport planning (more bus services) and car parking that was nearer to the centre. Furthermore, they wanted to see more independent (artisan and craft) retailers in the centre, as well as an enhanced night-time economy, comprising a more diverse entertainment and leisure offer, including more bars/cafes/restaurants, museums, soft play, market events, and improvements to the theatre. Finally, discussions arose regarding a desire for more town centre housing, as well as a retirement village in the future, to enhance centre liveability.

Things to <u>remain</u> in 2030	**Relate to vitality and viability factors**	**Things to <u>change</u> by 2030**	**Relate to vitality and viability factors**
Key retail anchors (Boots and Lidl)	Retailers and services	More independent retail (artisan and craft)	Chain vs independents
Train station	Accessibility	Better connectivity within, and leading into, the centre. Parking.	Accessibility
The gardens	Recreational space	More diverse entertainment and leisure provision (e.g. cafes, bars, restaurants, soft play, museums, market events, theatre).	Entertainment and leisure
Town centre architecture	Appearance	More town centre housing provision (including a retirement village)	Liveability

Table 4. Aldershot mapping exercise

Image 4. Illustrative Aldershot map

What do people want to see on the high street of 2030?

There are some common features that people already value, that they would not want to see replaced on the future high street. Independent traders being the most commonly referred to. In contrast, there are some features that are unique to specific locations, like the harbourside in Bristol, or The Gardens in Aldershot, which were seen as significant attractions. This reinforces the need to 'ground' global approaches to improving high streets and town centres in a local context. Too many reports on what the high street of the future should look like assume there is only one type of high street, replicated in towns and cities across the country. Often, people choose to live or shop in particular locations because of a certain amount of distinctiveness. Nevertheless, comparing the factors identified as important on the 2030 high street to the 25 factors identified in the High Street UK 2020 study shows there is a high degree of similarity, in fact, none of the top attractors for the 2030 high street were any different from what the High Street UK 2020 study suggests is important now. Whilst high streets evolve, it is still people that are visiting them – and, as humans, our motivations are remarkably stable over time. The consumer of 2030 imagines that they will want to eat and drink nice things, be in a pleasant environment, get access to the things they need, be attracted to something a bit different sometimes, not waste too much time moving around, and feel safe. Like the consumer of 1930, or even 1830…

This illustrates an important point. Existing research tells us what will make town centres more vital and viable both now, and in the future. Scientific research can ensure that data is reliable, generalizable and representative. Whilst the evidence captured in the workshops is very useful, and provides a lot of depth and description, it should not be relied upon to identify all the issues. For example, the number one priority for improving vitality and viability, from the HSUK 2020 study, is 'activity hours' – making sure the centre/high street offer is open during optimum times to meet catchment needs. Whilst there were references to night-time economies, places to eat and drink, gyms, cinemas and leisure activities, there was no specific reference to opening hours changing, even though it is clear they are often far from 'optimum'. Changes in technology and society mean that the traditional 9-5 opening patterns need to adapt in more locations, and supporting this could be a 'quick-win' in many locations.

What about young people?

To capture young people's views on the high street, four members of the IPM research team visited a teenage market held in Bolton on 15th September 2018. Interviews with 10 young market traders were conducted. Interviews were semi-structured, yet conversational in nature, and included questions about the items being sold; perceptions of the market; differences between the market and town centre; challenges faced by town centres; ideas about how to improve the high street; and whether their views about the high street had been sought before. To better understand the history, organisation, and impact of the teenage market on Bolton town centre, interviews were also conducted with the teenage market co-founder, assistant market manager, and media manager. Detailed notes were taken during interviews, and typed shortly after the market visit. Key themes were identified in the interview data, with NVivo software aiding data analysis, organisation, and visualisation.

To enrich the interviews, participant observation was also conducted during the market visit. This helped us to better understand what people actually do at the market, as well as allowing us to capture the sensory aspects of the market experience. Observation sheets were created beforehand to guide data collection, and they were structured in two halves: the first directing researchers to conduct 10 minutes of uninterrupted observation; and the second to identify two key incidents or social interactions. During observation, researchers took detailed fieldnotes, which were later typed into longer narrative form. Multiple photographs were also taken during the market visit to further illustrate the activities being observed.

Sociality

Four key themes were identified in the data, the first of these surrounding sociality. It was evident from the interviews with the young traders that the market engenders feelings of community and belonging. Indeed, this was also observable during the market visit, whereby families could be seen browsing the stalls together, and groups of young traders chatting and having fun. As evidenced by the illustrative quote below, it was commonly noted by interviewees that the market helps to bring friends and family together in a way that the town centre alone often fails to do (Image 4):

"...There is more of a sense of community. I think you see more groups of people together at the market. People bumping into other people they know. I suppose it's because our friends come and our family too and a lot of the people know each other already" [*Young female trader; jewellery*].

Image 5. Market bringing families together

Furthermore, as well as bringing existing social groups together, it was also noted that the market helps to build confidence in meeting and speaking to new people, in turn sometimes leading to new friendships being formed, as in the case of two females selling art prints:

"I've also made friends from the last time I traded here with a girl opposite, who is also into art and sells drawings" [*Young female trader; art prints*].

Finally, it also became evident that the markets held in Bolton help to create and nurture inter-generational relations, which links to the 'networks and partnerships' factor for vitality and viability identified in the IPM's High Street UK 2020 project[30]. This is both in terms of market managers creating a welcoming environment for the young traders at the teenage market, and also from putting structures in place whereby young people can trade on the main market in Bolton for free, in order to learn more from each other:

"I've been coming to the Bolton teenage market for two years. I come because it's got a really good mix of stalls and I feel really welcome. It is really well organised. Tina or Steve will always greet us, take us to our stall, show us where I am today" [*Young female trader; jewellery].*

"...We gave some young people a free pitch on the traditional market, but we brand these stalls as young traders. And the existing traders really like it, even though they have to pay for their pitches. They see these young people as the next generation of traders and they are very willing to give them advice. And the young people are great with websites and social media too, so they learn from each other" [*Male assistant market manager*].

Lively atmosphere

It was also clear that the teenage market helps to generate a livelier atmosphere in Bolton town centre than is ordinarily the case when events like this are not being held, which relates to the 'experience' aspect of the 25 factors (Parker et al., 2017). This is created through entertainment, music, and active encounters between traders and potential customers. Shortly upon arrival at the market, such lively interactions between the young traders and passers-by were evident, as illustrated in the quote and image below:

Two excited guys with a lot of energy dart in front of us to hand out a small leaflet about their stall, and motion us over; smiling and seeming very proud of their cakes. Cathy and I follow them over... [*Fieldnotes*].

Furthermore, music and entertainment evidently play an important role at the market, which links to how stakeholders at the MHCLG evidence workshops often expressed desires for there to be entertainment and leisure experiences in their high street in 2030, such as cinemas, bars, and music venues. Indeed, entertainment and leisure are an important way in which centre vitality and viability can be enhanced (Parker et al., 2017). As a young male trader selling comic books noted, "the young people that are here make it very lively. It's animated. Music and dancing and other things help draw more people in". As the assistant market manager further explained, they have changed the layout of the market so that there is now "...a more Continental structure with the stage at the end". During the course of the market visit, loud music was notably playing through stage speakers, with two entertainers on the stage getting the market crowd going through their microphones. As captured in the fieldnotes below, the music helped to create a lively atmosphere, particularly when it was a song the young traders were familiar with, with dancing and singing often observable (see Image 5):

I notice that more current music is now playing through the speakers. *Despacito* seems to be popular with the younger traders, with some of them noticeably singing along. But it's DJ Caspar's *Cha Cha Slide* that really shifts the atmosphere. Two young girls from a stall... get up on stage with the two older male entertainers and begin excitedly dancing, with the guys giving them

[30] C Parker, N Ntounis, S Millington and others 'Improving the Vitality and Viability of the UK High Street by 2020: Identifying Priorities and a Framework for Action' (2017) 10 Journal of Place Management and Development 310.

encouragement through the microphone, trying to draw the shoppers' attention. As I look behind me, many of the traders are smiling, and the two guys from my first interview seem to know all the moves; one of them on the floor with his feet under his knees at one point to the lyrics "How low can you go" [*Fieldnotes*].

Furthermore, the atmosphere notably shifted again to one of collective pride and admiration when one of the young traders took to the stage for a musical performance:

Grace takes to the stage with her ukulele. The other stallholders wave and murmur encouragingly. As Grace starts to perform, the other traders film and take pictures. They look on admiringly, supportive, happy, proud. Families stop. Kids in pushchairs look at the stage as long as they can, before they have to turn their necks as they are pushed away. Older women, especially, stop and smile. The pace slows for shoppers as they watch Grace perform... It might be the music, but most people seem to be lingering longer in the space. Some of Grace's friends walk past the stage, five teenage lads. They wait for her to finish her song. They applaud. "Well done Grace", they shout. Grace giggles. It's very positive. She ends with Wonderwall. The traders near the stage join in. So do I. [*Fieldnotes*].

Image 6. Dancing traders

Handmade crafts

It was also evident from the data, that the craft-based and handmade nature of the items on offer at the market were particularly liked by shoppers, in contrast to the more generic merchandise regularly provided on the high street. This links to how MHCLG evidence workshop participants frequently expressed positive views of the independent shops, cafes, and bars in their town centres, and wished these to remain in 2030, which was especially notable in Bristol and Holmfirth. During the market visit, stalls selling handmade cakes; sweets; jewellery; cushions; comic books; picture frames; badges; and art prints were observable (Images 6 and 7). As a young female trader selling art prints commented, "...you can get more handcrafted items at the market than you can ordinarily find in the shops", which makes the market seem more attractive to her than the main high street shops, which she explained she rarely explores. This is further reflected by a youth club leader's observations of how older shoppers also value the handmade items provided at the teenage market:

"...We also get older people because they understand that people have actually made the goods. They really value that, it's important to them" [*Male youth club leader*].

Indeed, an older shopper interviewed during the visit spoke about their positive market experience, in part driven by the unique items being sold:

"I found it a very positive and happy experience because you've got all these keen, young, well-mannered traders selling really nice cakes and nibbles as well as quirky unique craft ware".

Image 7. Handmade items on sale

It’s my high street

The final key theme evident in the data was that, in contrast to workshop participants, the young traders on the whole were somewhat apathetic about the performance of high streets in general, but held positive views about their town centre. This was due to apparently not being as sensitive as workshop attendees to the general issues impacting retail in the UK and elsewhere, as well as seemingly having a lack of reference points to other town centres past and present from which to draw comparisons; unlike workshop attendees who sometimes expressed nostalgic views about high streets of a bygone era. They especially liked the renovations currently underway in Bolton town centre, alongside the diversity of things on offer for people to do, beyond just retail, demonstrating the important of a centre’s multi-functionality:

“It’s good. Bolton’s been undergoing renovations recently. The marketplace has been done up. There’s been a new bus station over the last year which makes it easier for people to walk through the town centre and market” [*Young male trader; cakes*].

“...I think Bolton has something for everyone. It's getting lots of food. It's got The Vaults. That's underground, under the old market. There's mini golf, and Nandos and the cinema. I went there with my boyfriend on our first date. But I go there a lot especially to the cinema with my family and my friends. It's where we meet - it's where we go out” [*Young female trader; jewellery*].

Despite generally holding positive perceptions of Bolton town centre, however, the young traders came up with a diverse range of suggestions as to how it could be improved, including: more frequent and cheaper public transport; more bars and restaurants; better walkability (e.g. more public open spaces); more marketing of the events going on in the centre; and more creative use of existing spaces (e.g. pop-up food and drinks markets).

How to engage more young people with their high street: The Teenage Market Model

The teenage market concept was created by brothers Joe and Tom Barratt to give young people aged between 13-25 a free platform from which to showcase their creative talents, both in terms of entrepreneurship and entertainment (https://theteenagemarket.co.uk). The first teenage market was trialled in their hometown of Stockport on April 1st 2012, and since then has spread to over 30 locations across the UK, including Bolton, bringing benefits to town centres such as increased footfall, spend, and new visitors. Joe and Tom were given 'Special Recognition' in the Great British High Street Awards in 2015. Joe Barratt was interviewed by the IPM team. His responses are presented as key findings below.

Image 8: Joe Barratt, Teenage Market Co-founder

Reducing the barriers to entry

By offering a free platform, The Teenage Market addresses a key barrier to entry onto the high street for younger entrepreneurs. Free markets can provide a platform to build a sustainable business with a more permanent presence in the centre. Specifically for younger people, the market provides a mechanism for empowerment and adult opportunities, which can challenge societal expectations of younger people. Furthermore, the market generates social value, an independent income stream, and is a proactive social space for younger people to meet. Thus, the market provides a space of social interaction for younger people both trading and shopping at the market. The market can operate in areas where there are currently limited opportunities for younger people to develop their entrepreneurial skills and business ideas. In doing so, the Market provides a contrast to other models of enterprise development, because it offers opportunities to learn through direct experience and trial and error e.g. how to fix price points, or engage customers.

Intergenerationality

Some events take place alongside traditional markets, which creates opportunities for inter-generational contact and exchange, and cross fertilisation of ideas, whereby younger traders begin to learn from the experience of established traditional traders, whilst traditional traders have learnt more about establishing online presence. The market appeals to a wider demographic, informing younger consumers about the legitimacy of a market as a place to visit, as opposed to the perception that markets are places for older people.

How the Teenage Market contributes to revitalization

Crucially the Teenage Market is not just about retail. Through an attempt to create a temporary pop-up event engaging wider creative arts, through a fusion of music, crafts, and live entertainment, the market drives place-making through place activation. It is as much an experience than simply another place to go shopping. The products, however, remain central to the identity of the market. Authentic, hand-made, and unique items and services, creates individuality and distinction, in contrast to a traditional market or mainstream retail. Thus, the market provides a flexible and adaptable space to diversify the offer in the town centre.

Barriers and threats

Whilst the Teenage Market is an established and innovative platform designed specifically to engage more young people with their high streets, mainstreaming such a concept is subject to a number of barriers and threats.

Local government funding and support

The Teenage Markets operates on franchise model, where market operators, typically local government, will pay £500 a year to buy-in the Teenage Market brand. However, local government funding cuts and changing priorities poses a threat to this franchising model. Only 50% of towns renew the franchise, perhaps in places where giving free market stalls is not seen as a priority. Even across the local authorities that subscribe to the Teenage Market model, there are big differences in the level of resource given by local authorities to event promotion, investment in market spaces and practical support to the young traders. Bolton Markets is a model of good practice, but it is unusual in its level of commitment to young people.

Attitudes and perceptions from existing traders

Whilst the attitudes and perceptions of established traditional market traders towards The Teenage Market in Bolton is very positive, this is not always the case, with some friction concerning how the market creates unfair competition (free stalls), and how the event might deflect footfall from their stalls. There remains concern that there is an inertia in traditional markets to adapt, and that anything ‘new’ is seen as a threat. Referring back to the three practices of good place management detailed earlier in this report, the team at Bolton Markets take a leadership role in managing a vision for the markets; as being inclusive, responsive and a core part of the community. They communicate effectively with the public and the traders, and also offer them training and support (knowledge), so they can adapt to changes in consumer demand. This allows the markets to adapt and contributes to the adaptation of the town centre.

Involvement of young people in place decision making

There remains difficulty of involving younger people in the formal decision-making structures responsible for town centre management and development e.g. local authority planning decisions, BIDs, town teams.

Decision-making structures are seen as too formal, rigid and top-down. Access to these networks and structures is also restricted, perhaps because younger people lack the necessary technocratic language and experience to engage effectively. Even when young people show incredible passion, initiative, and expertise, in the case of Joe and Tom, they are excluded from the existing networks and structures.

Young traders and smaller independents in general are said to lack corporate experience. Consequently, there remains a narrow range of voices involved in local governance structures, which do not speak for these interests. There is a suggestion of age discrimination, which results in a closed shop. There is a need therefore, for alternative models of representation, which involve all stakeholders in the town centre. Whilst, in an earlier section we talk about the potential for planning to engage the knowledge of diverse groups, our interview with Joe suggests the planning culture works against change, diversification and adaption.

What needs to change?

The last exercise of the evidence workshops was to collect a list of priorities, or the 'big things' that needed to be tackled for the town to be successful. Participants were asked to work in groups of 6-10 and each group was facilitated by a member of the IPM or MHCLG team. First, participants were asked to think of a barrier to progress, something that needed to change. Then they had one minute to explain this factor to other people on their table, in a form of 'elevator pitch'. The other participants then scored each factor in terms of what impact it could have on the town.

Holmfirth

Factor	Score
Positive politics	5.00
Engaging young people	4.80
Use of the market	4.80
Positive attitude	4.80
Funding	4.75

Table 5: Top 5 factors for Holmfirth

The feeling that local politics has hampered the achievements of the town is clear as 'positive politics' is identified as the number one factor that, if cracked, would have a positive impact on the town. How many towns are like Holmfirth, ignored by their nearest level of government? What is the redress for communities that feel they have been let down? In other sectors we have ombudsmen who can get involved when individuals or groups are poorly served. Town centres and high streets have been let down by politicians – now is the opportunity to change that.

In Holmfirth, the engagement of young people was the second most important factor. After all, young people are the consumers, traders, politicians, residents and public sector workers of the future. But how do we engage them? The interviews with teenage traders and with the co-founder of the Teenage Market shows the willingness and enthusiasm they have and how positive they feel about their local high streets; but existing structures and systems let them down. We must act on that.

The use of the market was identified as the third most impactful factor. Previous research has demonstrated the value of markets, in terms of their economic, social, cultural and political function. They are also flexible spaces, that can be quick to innovate and adapt. The attendees at the Holmfirth workshop think this, but the attendees at the Altrincham workshop know it, first hand. If we are not to repeat the mistakes of the multiple retailers and shopping malls, we must resist forces of homogenisation, even in markets. In Holmfirth, culture, music and events are important – so it is likely these should feature more in any further development/activation of the market. A cookie-cutter approach to making markets must be avoided.

A positive attitude was the fourth factor. Again, this ties into the long-term legacy of the town, which has been somewhat 'forgotten' by local government, and perhaps, somewhat ridiculed as the home of 'Last of the Summer Wine', the residents have made a lot of progress, seemingly through good will and a positive attitude. How long does a positive attitude last when it is constantly tested though? The workshop was one way of congratulating towns and stakeholders for what they achieve, and, hopefully, rebooting a positive attitude. Both the individuals and the locations that proactively manage change deserve more recognition and a higher profile.

Finally, funding was identified as something that needed to change in Holmfirth. Again, because Holmfirth has not been so engaged in public sector initiatives, then money has not been forthcoming. Now the town has the attention of their MP (who attended the workshop) and Kirklees council, we would hope that more effort will be made to find suitable funding sources for some of the very sensible projects that stakeholders have identified.

Altrincham

Factor	Score
Town governance/management	5.00
Emphasising unique identity	4.83
Increased residential units	4.71
Family friendly spaces	4.67
Level playing field (online)	4.67

Table 6: Top 5 factors for Altrincham

In Altrincham town governance/management came out as the most important factor. Reflecting, perhaps, a bit of a vacuum left by Altrincham Forward and the retreat of Trafford Council, since the Business Improvement District was formed. Similar to Holmfirth, a regular review of town centre governance and management might help to identify problems, before they grow to such an extent as they hamper progress, or even undo good work that has already been done.

Interestingly, emphasising a unique identity was the second factor, picking up the point made above about Holmfirth needing to have a market that would work in Holmfirth – not simply copy Altrincham's. Attendees at the workshop were already saying they needed to identify the next unique attraction or element of the town's identity, to stay ahead. In other words, not just wait for every other northern town to start a foodhall, and see Altrincham's popularity suffer as a result.

Having more people living in the centre was identified as a factor, but this also led to a long discussion about the night-time economy and balancing the needs of different users. Considering most of the attendees were not professional place managers, they knew a lot about the typical contestations and issues involved. A major challenge remains as to how to harness this knowledge. Running workshops is one way, but more regular forums are needed to obtain the wisdom of the crowd.

Family-friendly spaces were also important. This ties into the theme of intergenerationality found in the analysis of the Teenage Market. With changing demographics, and more people ageing, then the whole age range of families need to be catered for in our town centres and high streets. There are excellent examples of good practice around the world, and finding a way to share these easily with people would appear to be a 'quick win.'

The final point raised is more difficult to solve. The issues of business rates, the non-payment of corporation tax by some online retailers (and offline ones too) is frequently covered in the media, and it an issue which has been picked up by recent reviews of the high street. The low vacancy rates in Altrincham, and the diversity of independent traders that are contained within the markets, may suggest that this problem is not so much of a barrier in Altrincham, as it is in other places. Nevertheless, it is perceived as a problem – therefore Government would be wise to take some sort of action.

Bristol

Factor	Score
Connectivity/movement	5.00
Mixed use	4.83
Active place management	4.80
Convention centre	4.83
Diversity in decision making	4.60

Table 7: Top 5 factors for Bristol

As mentioned previously, in Bristol more of a 'masterplanning' approach to the workshop was taken. Connecting up various parts of the city came out as the number one priority, with more mixed-use development as number two. Existing planning and programmes aimed at improving transport and access as well as diversifying uses should serve Bristol well. As a large city, it has a planning department and the capacity to act.

However, planning is not the only practice that makes good places. After the plans has to come action, and then ongoing management and maintenance. It is this latter phase that is often forgotten – and has borne the brunt of many cuts in local authority spending. Whilst new types of place management organisation are often formed to fill these gaps, like Business Improvement Districts, this then needs different types of governance, to ensure that all the organisations understand their role, and they work collaboratively and not competitively.

The proposed conference centre was the only large scale concept put forward in the workshops. As a popular city with a range of attractions, served by an airport, railway station and major road network, it is likely a conference centre, in the right location, would increase the vitality and viability of the city centre. There is little central government needs to do, in this respect, apart from to be mindful of Bristol's number 5 priority 'diversity of decision making' when investigating any planning disputes. The evolution of this concept to provide a conference centre, hotel and mixed use proposal reflects the importance of ensuring projects are developed in a manner that supports inclusive and sustained engagement in local decision making to avoid a legacy of unfortunate 'white elephants'.

Shrewsbury

Factor	Score
Money	4.83
Behaviour and attitude to change	4.80
Infrastructure investment	4.60
Investor interest and confidence	4.20
Capability of local government	4.17

Table 8: Top 5 barriers for Shrewsbury

In Shrewsbury, a slightly different question was posed. Participants were asked to comment on what would stop the town achieving the aspirations embodied in the Big Plan. Not surprisingly money came out as the number one factor. Most of the workshop attendees were aware that the plan is a strategic document setting out the type of development that should take place, not a guarantee any of that investment will take place – even in the infrastructure development (which was the number 3 priority – and, upon which, a great deal of the plan depended).

Interestingly, despite the achievements of the town in coming together and making the plan, behaviour and attitude to change was cited as the number two factor. This reinforces earlier points about the limitations of planning, and how actions and achievements should also be encouraged and rewarded. Nevertheless, as investor interest and confidence were listed as a separate factor, this does suggest that communications that emerge from the town may go some way to signalling the aspirations and the potential positive return on investment. More work could be done at a national scale to present smaller towns as investment opportunities.

Finally, the capability of local government was identified as a barrier to progress. Mirroring points we have made earlier about the lack of leadership ability, incomplete knowledge and poor communication skills, some local authorities do not seem to have the collective skills or ability to take on the challenge of town centre change.

Aldershot

Factor	Score
Low emphasis on heritage	4.5
Negative perceptions of place	4.4
Empty Galleries shopping centre	4.25
High rents	4.25
Over emphasis on retail	4.25

Table 8: Top 5 barriers for Aldershot

As mentioned previously, the Aldershot workshop was not organised by an existing partnership and that may be reflected in the slightly lower scores for the factors, compared to the other locations. In other words, there may be slightly less consensus as to what the barriers to progress are. Nevertheless, it is clear that the participants were concerned that the town does not live up to its image of being 'the home of the British Army' as a low emphasis on heritage was the number one factor. Aldershot is in the enviable position of having something unique and distinctive, but this does not appear to be protected or promoted in the development and management of the centre.

Aldershot was the only location to identify negative perceptions of the place as a barrier to progress. However, we also link this to the lack of collaboration and partnership working. IPM has had a long-relationship with members in Altrincham and Holmfirth, and a few years ago both towns would have mentioned negative perceptions as a barrier. However, in both towns, the process of engaging more people and organisations into action not only changes perceptions through progress, but stops people talking down the town as they feel more responsible and more pride.

An empty shopping centre is an obvious, physical sign that the town is struggling and impacts negatively on perceptions. The council is working with a developer to bring forward a new scheme for the site but dependent on the nature of this it may not change perceptions. It is important that what comes next is going to have a positive impact, and that needs leadership, knowledge and communication – all of which need development in the town.

High rents and an over-reliance on retail may well be linked. For many years towns have been reliant on retail as an anchor, but even as larger retailers retreat from smaller locations, many landlords are unwilling to adjust their rents or repurpose their space. Without developed leadership, knowledge and communication Aldershot does not have a realistic, shared vision of how to reposition and cannot, therefore, articulate this to landlords, which means that it is difficult to attract the smaller businesses and independents the community may require.

Reflections

After visiting six very different locations, meeting a variety of business owners, employees, councillors, local authority officers, young market traders, residents, public service providers and property owners, we have seen a variety of approaches to managing change on high streets and town centres. We hope we have presented a representative picture of the challenges that people who want to make change happen face. The view from the ground is very different to how the problem of the high street is viewed in national forums, or from particular sectors. We hope this evidence can help the Expert Panel make recommendations that can transform our town centres and high streets.

The evidence presented shows the process of achieving change is complex, it involves a diverse group of people, but given the evidence we have gathered about the engagement of young people, we would argue these groups are not diverse enough. The process is also never-ending. As soon as one issue is solved, one project finished, one scheme completed, then others will start. There is no room for complacency, our high streets and town centres need constant care and attention There is no such thing as 'perfect', and this was clearly recognised in Altrincham, even though it has been recognised as England's Champion High Street. The legacy of one approach will impact on the next. Our town centres and high streets are a visual representation of decisions and actions that, in some places, go back centuries. Because of this, every place is different. There is no blueprint for success. The barriers to success in each location we visited were different, but 23 out of 25 of the barriers identified could be solved locally (only high rents and business rates could potentially be resolved 'from a distance'). Nevertheless, there are some fundamental reflections that we would like to reiterate. These reflections identify productive areas for future development and support that will reap benefits in terms of transforming high streets and town centres.

Place leadership and partnerships

Too many locations have no leadership at all, or are stuck with a model that is dysfunctional and that is when the challenges and issues are met with apathy[31]. All town centres and high streets are subject to the same 201 factors that influence their success (or failure)[32] but only some have the collective capacity to act. So, place leadership needs to be understood as something quite fluid, a source of energy and the capacity to bring about change in a *collaborative* fashion. Altrincham, Holmfirth, Bristol and Shrewsbury are characterised by their willingness to engage in partnership working. Local authorities that are not working in partnership with their wider communities are just (poor) administrators of place. In the same way other organisations, such as Business Improvement Districts, need to understand their role in the place leadership landscape, working collaboratively with the public sector, resident groups etc. Places need to be willing to restructure their management and governance models so they are periodically reinvigorated and fit for purpose.

[31] C Parker, N Ntounis, S Quin and I Grime, 'High Street Research Agenda: Identifying High Street Research Priorities' (2014) 7 Journal of Place Management and Development 176.
[32] C Parker, N Ntounis, S Quin and S Millington, 'Identifying Factors That Influence Vitality and Viability' (2016).

Place knowledge

Good place decision-making needs a combination of expert (outside) knowledge, local knowledge and objective data. Of course the actions and projects of other places can be inspirational, but town centres and high streets have been sold the mis-sold the dream of ‘best practice’, by consultants, developers, trade association even, at times, government. Best practice can only ever be what is right for a particular town. Local knowledge is needed to deliberate over, critique and evaluate ideas and advice. Local data, like footfall, is crucial to understand the fundamental functions and performance of the town. This enables baselines to be developed and progress to be monitored. Projects and ideas can be piloted and tested. Plans can then be adapted and changed. The process of working in this way creates valuable new knowledge, and a sense of confidence in decisions that are made using it.

Place communications

In Altrincham, Holmfirth, Bristol and Shrewsbury a variety of people, organisations and partnerships promote the place and share plans, projects, achievements, even problems etc. with the wider community. Communication is open and takes many forms, using many media. Of course there are always naysayers, disruptors, and people who jump on any kind of communication, but where effective leadership and partnerships exist these individuals do not stop the flow of communication. In contrast place perceptions cannot be influenced by place communications if there is entrenched hostility between groups. Where effective leadership and partnerships do not exist, communication is characterised as too infrequent, inauthentic, defensive or vague to the point it is devoid of meaning.

A richness in place communication can also have other benefits. Unlike product brands, where communications are carefully constructed and controlled by the brand owner, place brands are distilled from a plethora of messages. This relies on lots of people communicating different messages about the place. Places which try and ‘lock down’ or control a place brand are wasting their time. A place brand can be reinforced, even amplified but not created through more traditional forms of marketing communication.

Places and young people

Our research has demonstrated that young people have a valuable contribution to the evolution of the high street. Not only are they the consumers, retailers and other stakeholder of the future – they have excellent ideas and a different perspective to give now. Already, with their knowledge and insight, some of the traders on the teenage market would make valuable board members for place partnerships. Joe Barratt, the founder of the teenage market, has a great initiative that can bring more young people into town centres, as suppliers, performers and consumers. Who is best placed to communicate about the town with young people? Other young people. We are missing a trick by not involving young people, both more formally and informally, in the decisions about and ‘production’ of and promotion of the high street. However, this research also demonstrates how the system currently excludes them.

Place professionals

In Altrincham, Holmfirth, Bristol and Shrewsbury the workshops were organised by place professionals. These are people that are members of their professional body, the Institute of Place Management, and adhere to a code of conduct and professional standards that facilitates collaborative leadership, ensures they have access to a body of place knowledge, helps them communicate effectively, and encourages them to strengthen democratic processes and act in the long-term interests of the place. Without these place professionals there is no long-term traction in place. They are the glue, the continuity, the bed-rock for many successful initiatives – that others may lead/fund and take credit for.

These place professionals can be found in the public sector, in local authorities, in the private sector and the voluntary sector. Unfortunately, at present, just having a job title that implies a person should be leading change in a location, instrumental in the process of managing change in a location, or even supporting change in a location is, currently, no guarantee that they are effective. Place management is just as important as place planning and therefore, like planning, place management is a *profession* – it needs a set of standards, a code of conduct, it relies on certain skills and knowledge. Place professionals do not always have a job title that reflects what they do, or even in the case of volunteers, do they even get paid for what they do. But they are professionals as they can be identified by their values, behaviours and conduct.

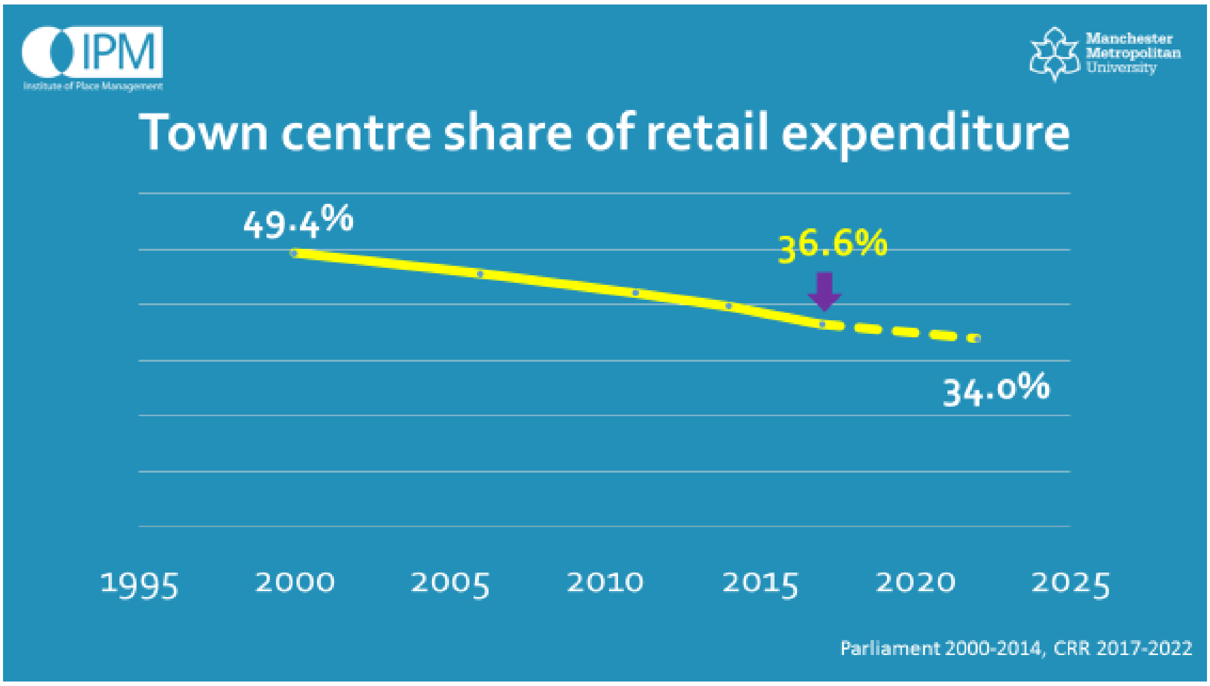
This report was only possible thanks to the help of all who participated in the workshop sessions and agreed to be interviewed on the Teenage Market. We want to express our thanks to them. It would certainly not have been possible without the very significant input from those in the locations who found venues, identified potential participants and organised the events. Much of this was done rapidly. Especial thanks therefore go to Margaret Dale and Carolyn Anstey (Holmfirth), Elizabeth Faulkner and Penny Bell (Altrincham), Jason Thorne and Sarah Morrison (Bristol), Seb Slater and Aleks Vladimirov (Shrewsbury), David Phillips (Aldershot) and Joe Barratt (The Teenage Market).

Appendix 1 –Summary of key trends and research presented at workshops

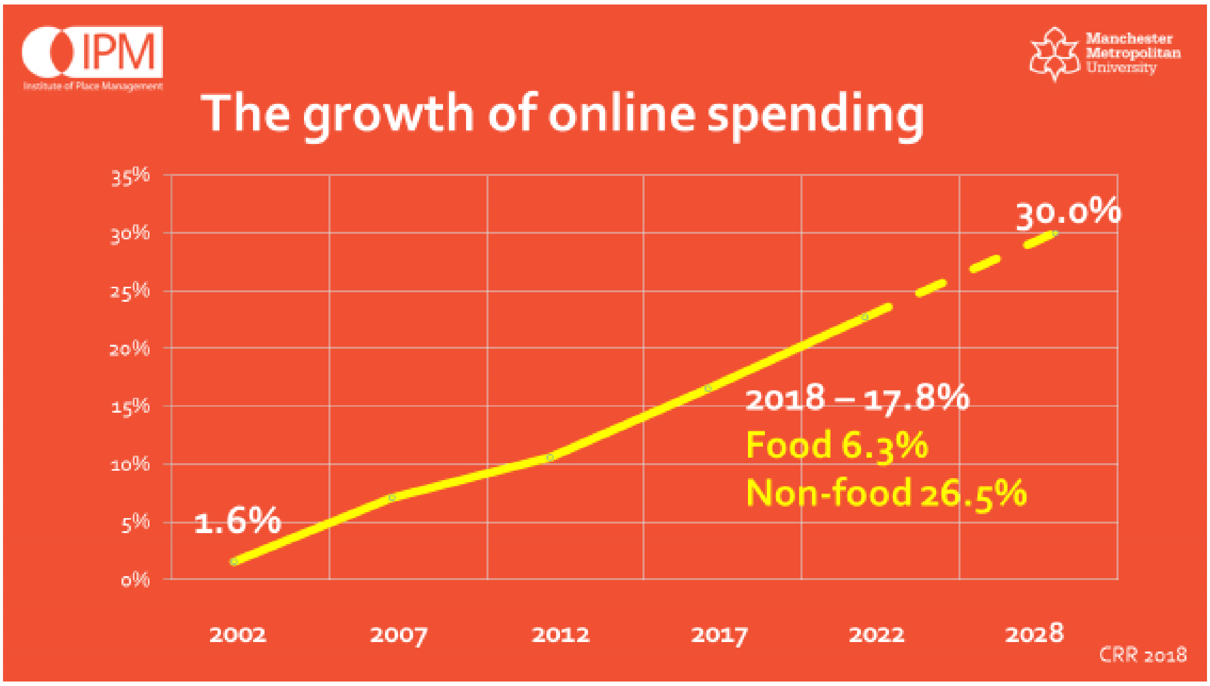
Changing high streets

Retail expenditure: Total retail sales in the UK were worth £395 billion in 2017 (House of Commons 2018). The percentage of retail expenditure in town centres has been declining since the rapid development of out of town retailing. Between 1987 and 1996 the amount of out of town floorspace grew by 4.9 million square metres, an increase of 87% whilst town centre space increased by 0.2 million square metres or 0.7% (Colliers 2005).

Retail expenditure in town centres is now estimated to be 36.6% and is forecast to drop to 34% by 2022 (Bamfield 2018). This compares with 49.4% in 2000 (Genecon 2011)

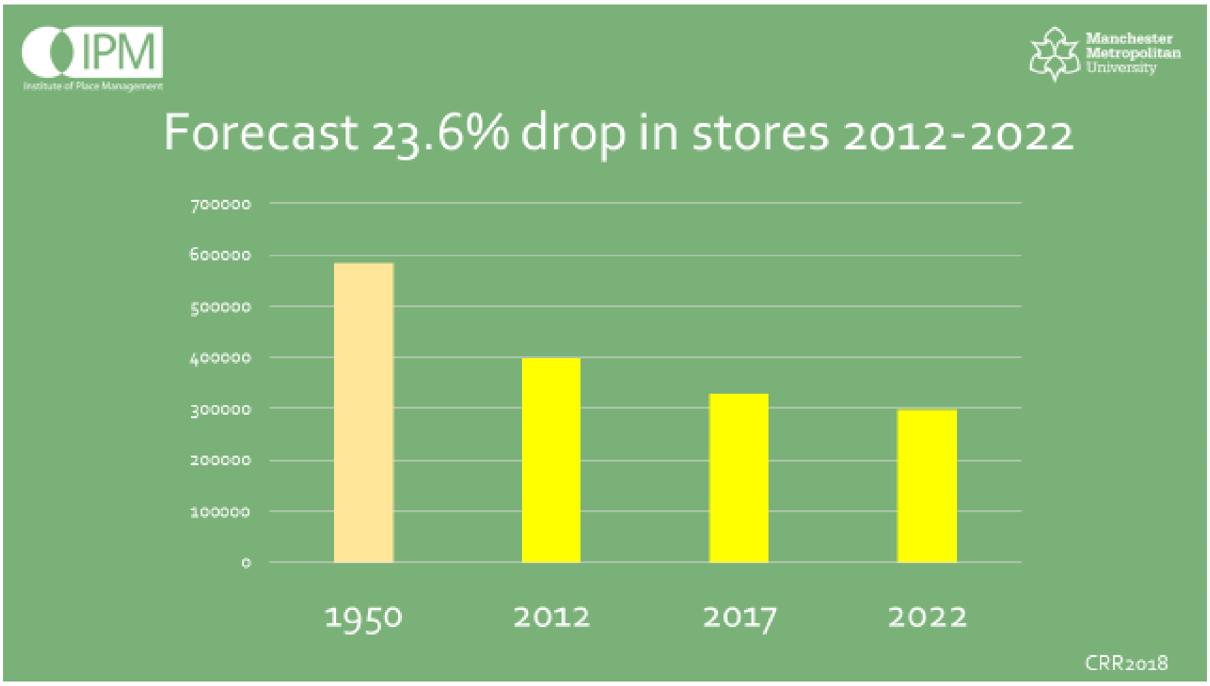


Online growth: A key driver in the continued decline in town centre retail expenditure since 2000 has been the growth in online spending. This has risen from just 1.6% in 2002 (Bamfield 2018) to 18% in October 2018 (ONS 2018). Online shopping is a much smaller percentage for food at 6.3% but higher for other goods (Bamfield 2018). According to the Centre for Retail Research, growth in online retailing is forecast to continue, reaching 30% by 2028.

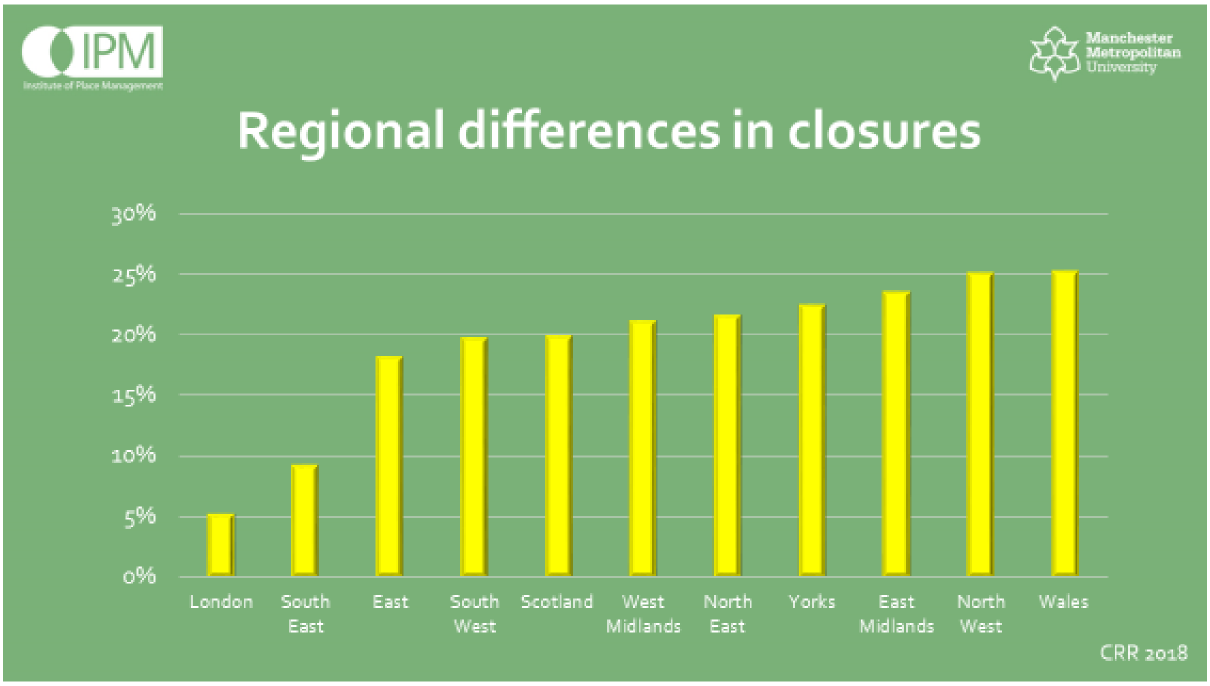


The UK is a world leader in online shopping. 82% of residents in the UK made at least one online purchase in 2017 (House of Commons 2018) and online expenditure has a larger share of retail spend than in other countries.

Store closures: The number of UK stores reduced by around 61,000 from 2012 (389,000) to 2017 and a further 10,000 stores are forecast to close in 2018 (Bamfield 2018). The Centre for Retail Research forecasts further closures out to 2022, meaning some 23.6% of stores will close over the period 2012-2022. It is worth noting that 120,000 stores (then also 23.6%) closed between 1971 and 1978. Store closure numbers cover all stores and not just those in town centres.

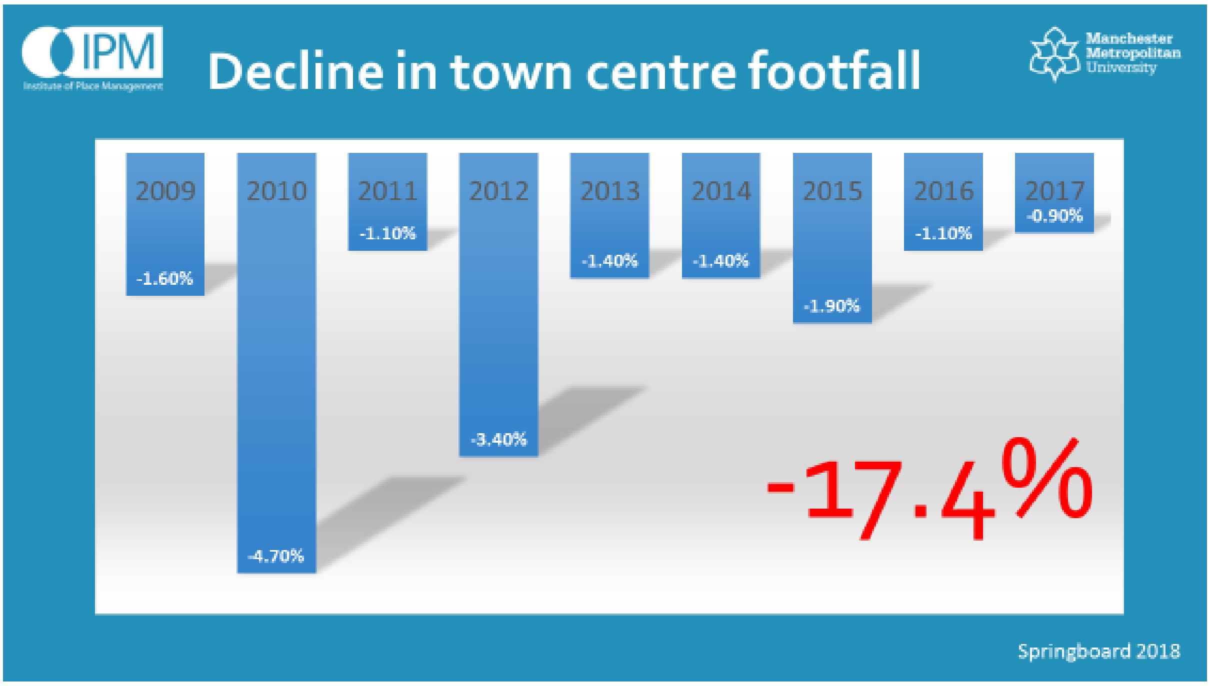


Of concern is that store closures are not even across the country. A far higher number of stores closures is happening outside London and the South East as the graph below shows using forecast data for the 2012-2018 period from the Centre for Retail Research.



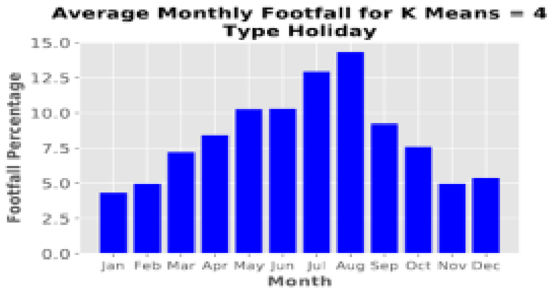
Changes in retail employment: Technological innovation and retail change that results are having a significant impact on retail employment. Nearly 400,000 job losses are forecast through store closures from 2018-2022 (Bamfield 2018), whilst the British Retail Consortium forecasts 900,000 job losses by 2025 (BRC 2016) and IPPR forecast 2.4 million jobs in wholesale and retail are at risk by 2030 (IPPR 2017).

Footfall changes: It is perhaps not surprising that the decline in retail expenditure is echoed in changes to footfall, though it should be stressed that footfall data covers visitors to town and city centres for all purposes and not just retail, though much of the counting is done in predominantly retail areas. The data we have used has been provided by Springboard, based on counts measured 24 hours a day, 7 days a week in some 150 town and city centre locations. Over the period 2009-2017, footfall has declined 17.4% in town and city centres.

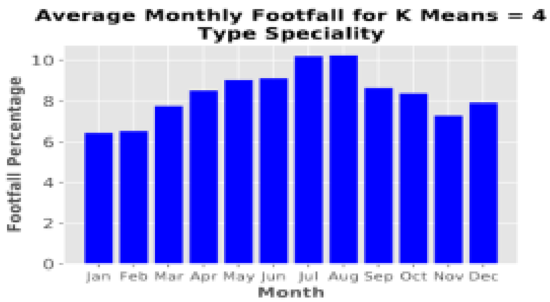


Recent analysis of footfall data for town centres shows that there are four distinct types of town and city centres in the UK based on how they are actually used during the course of a year. These variations in footfall patterns are important to understand when making decisions about the future of the town and reflect the changing nature of town centres (Mumford et al 2017).

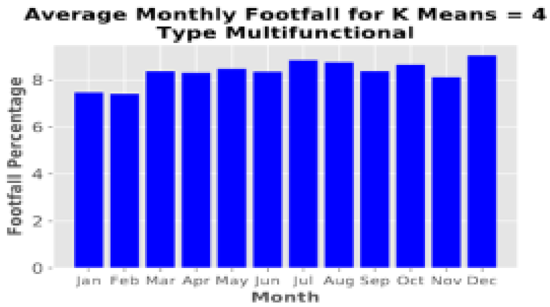
(a) *Comparison Signature*



(b) *Holiday Signature*



(c) *Speciality Signature*



(d) *Multifunctional Signature*

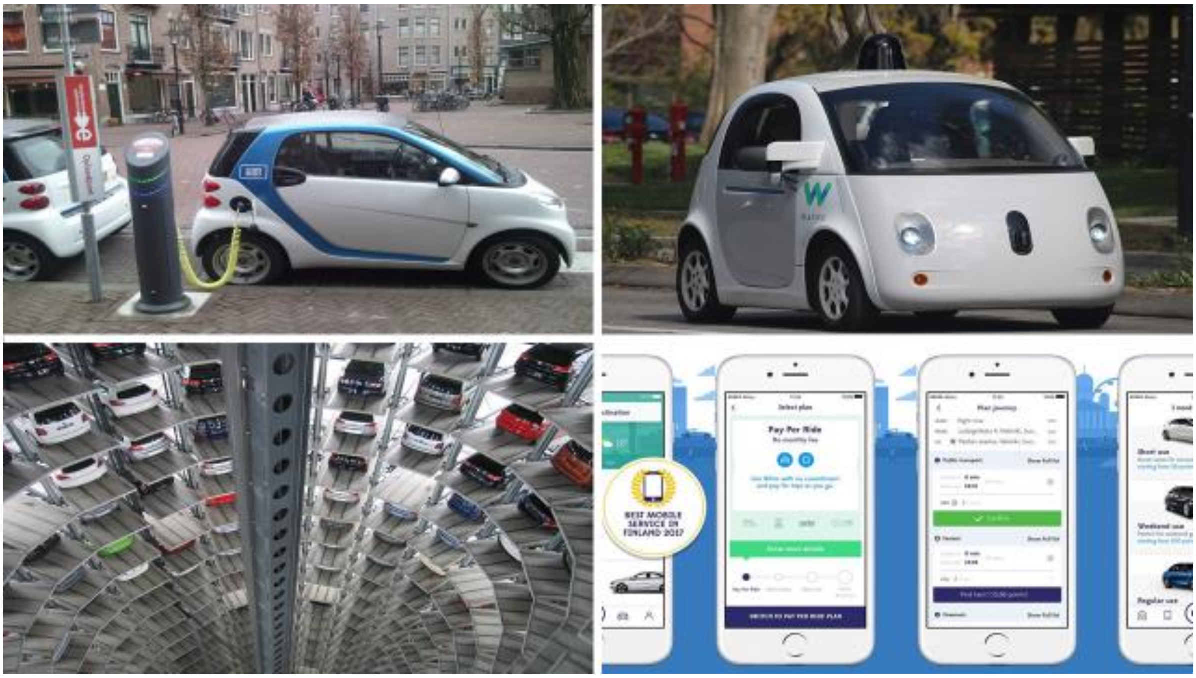
Changing environment

Demographic changes: The UK population is growing and is forecast to grow 5.9% in the decade to 2026 and to reach 70 million by 2029 (ONS 2017). The population is also changing in other ways and the Office for National Statistics forecasts that the number of people aged over 85 will increase 100% by 2041 and those over 65 will increase by 35%. How will town centres respond to these changes?

Mobility changes: Technology and lifestyle choices are set to have a profound impact on our mobility choices over the next 25 years. Sales of electric vehicles are forecast to grow from 1.1 million in 2017, to 11 million in 2025, 30 million by 2030 (28% of the global market), and 55% by 2040 (Bloomberg 2018a).

The development of autonomous vehicles will also influence our behaviour. Projections suggest autonomous vehicles will be in production in 2019, 1 million will be sold in 2025 and 33 million by 2040. Half of all vehicles sold will be highly autonomous by 2030. (IHS Markit 2018). The development of autonomous vehicles will have significant impact on car park capacity according to a University of Toronto study, decreasing the amount of space required by 62% (Nourinejad 2018).

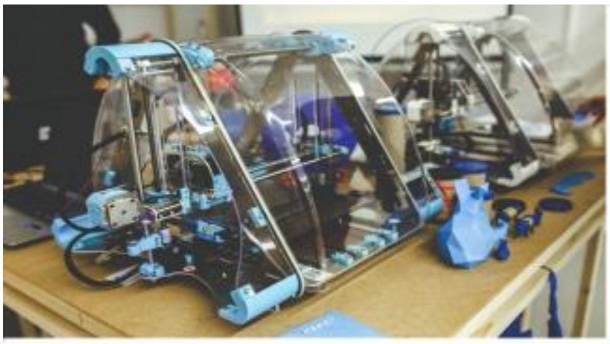
Change is already happening. Between 1995-99 and 2010-2014 there was a 36% drop in the number of car driver trips per person made by people 17-29 years of age in the UK. Young people are travelling less overall and the number of trips made by men 17-29 fell 28% and for women 24% over the same period. Just 37% of 17-29 year olds reported driving a car in a typical week in 2010-2014 compared with 46% in 1995-1999. (Chaterjee et al 2018).



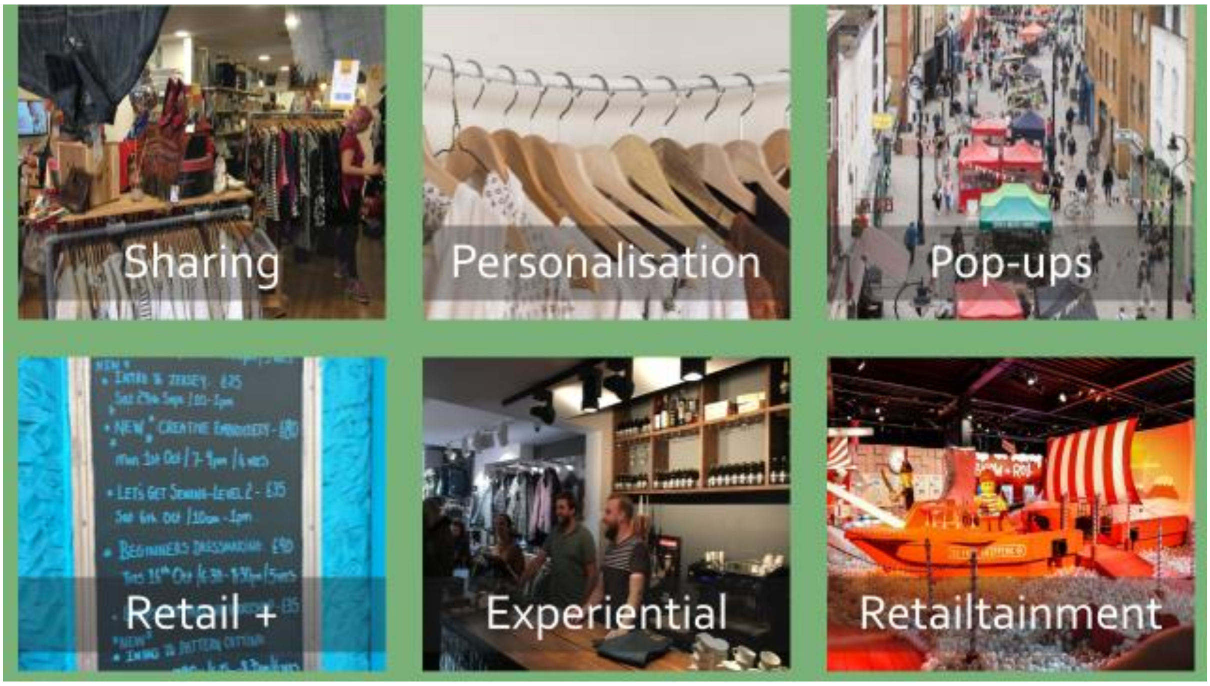
There is already movement in some cities to introduce partial or full bans on cars. Madrid has banned non-resident vehicles and cities such as Paris, Berlin, Oslo and Helsinki are discussing options, whilst Pontevedra in Spain has pedestrianised 300,000 square metres of the city centre, removing 14,000 cars a day from some streets. Oxford has announced it will start banning petrol and diesel cars from city centre streets in 2020 aiming for a Zero Emission Centre by 2035. In Helsinki an App called Whim is offering Mobility as a Service (MaaS). A single app provides booking, trip planning, ticketing, payment, ride hailing and car sharing offering seamless any mode travel in the city. (Bloomberg 2018b).

Technology changes: A report by the World Economic Forum foresees other changes having a significant impact on the high street over the next decade or so. 3-D printing is forecast to produce 5% of all consumer products by 2030 allowing micro-manufacturing on the high street but perhaps eventually in people's homes. The Internet of Things will enable each of us to have 30 connected devices by 2030. This will change our in-store experience, creating a far more personalised experience whilst convenience goods may be ordered and delivered automatically. AI and robotics are also forecast to radically change retailing experiences, providing more information and support and helping the shopper make choices in-store or online. It also means a lot more will be known about you and your shopping habits. (WEF 2017).

The changes that are happening need to be taken into account when town centre strategies are being developed. You cannot plan for the centre of the future based on what is happening or known today. When we look to 2030, we have to think what we know about the changing world.

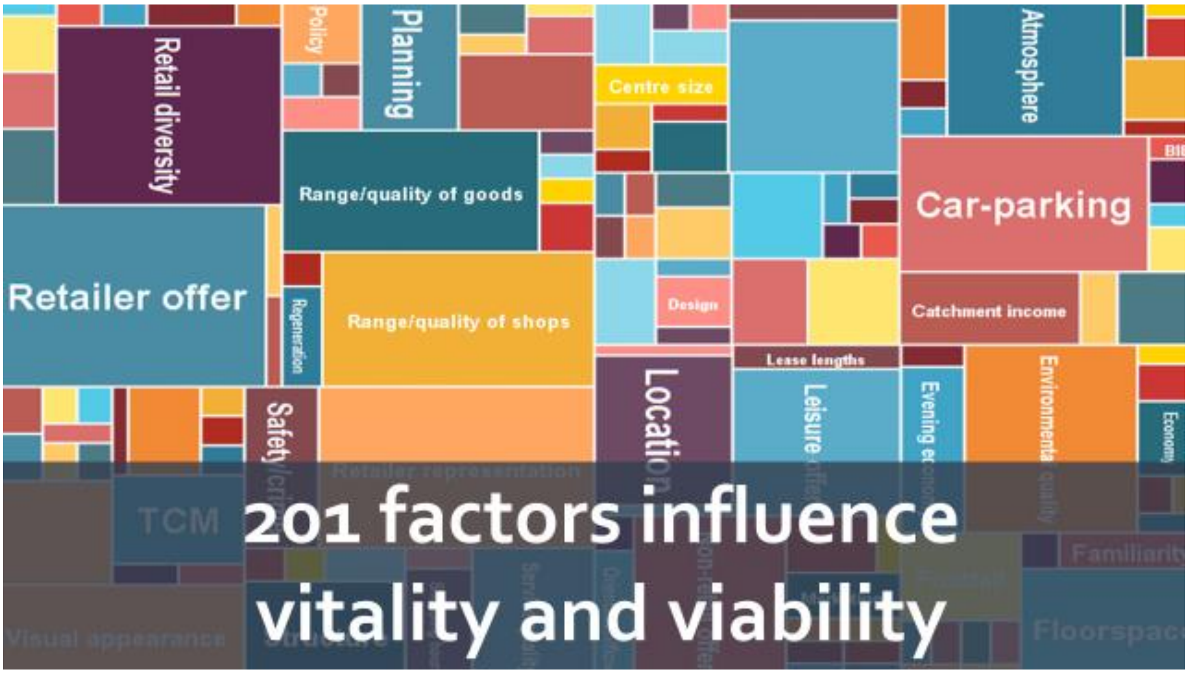


Retail changes: Not all of the changes talked about are in the future. Retail is already changing and though examples may not yet be on your high street, they are being tested and developed elsewhere. We are seeing growth in the sharing economy which is now entering into retail, albeit slowly. Renting clothing, sports equipment, do-it-yourself products may well become commonplace in the future and is already happening online. Another development is the development of more sophisticated personalisation in retailing that suits customers and drives sales. We are seeing growth in pop-ups and temporary installations that vary the shopping or entertainment provision in a centre. We also seeing retailers now offering services and support that go beyond the sale of a good. Classes, courses, workshops are becoming an accepted part of many high streets. Meanwhile other retailers are seeking to provide a different experience, perhaps a drink or entertainment whilst shopping, something that changes the shopping trip and makes people want to return.

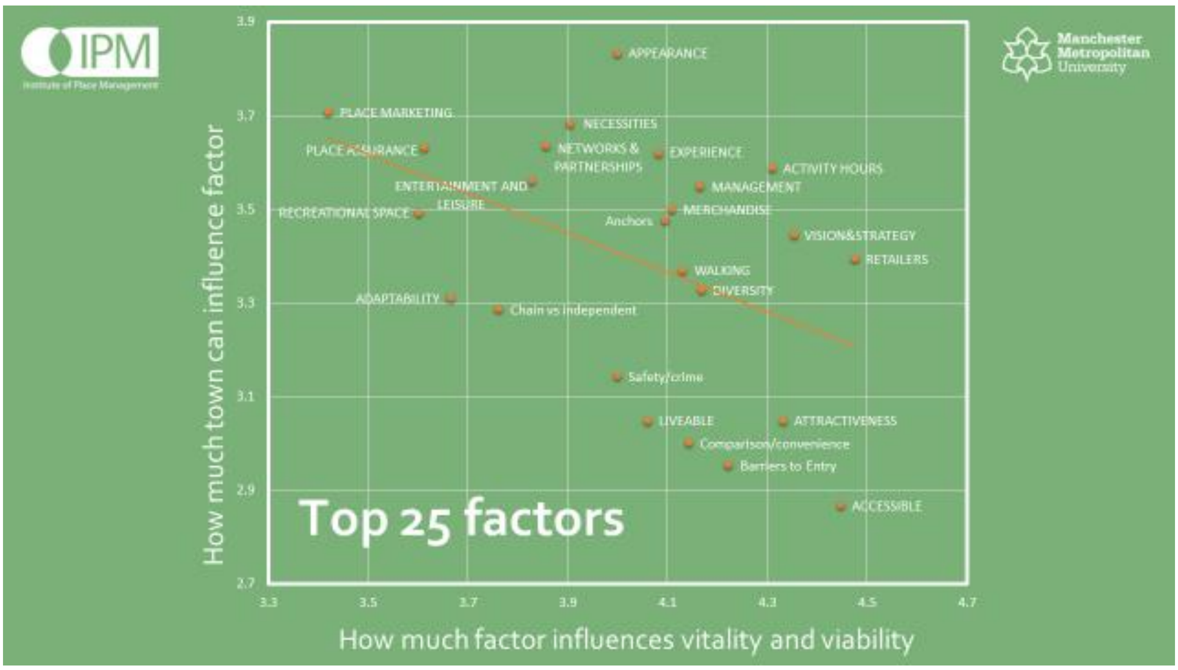


Town centre futures

There are many things you can do to improve the vitality and viability of a town centre. Research by the Institute of Place Management has identified 201 factors that affect the vitality and viability of the high street (Parker et al 2016).



To discover which factors are of greatest importance to local initiatives, we worked with 22 leading experts, practitioners and academics, to rank each factor according to its level of impact on town centre vitality and viability and the degree of control that can be exerted locally over a factor. We used these rankings and some further statistical analysis to identify the 25 most important factors to support town centre vitality and viability that can be undertaken locally. We believe that every town should audit each of these areas to assess their current performance and identify actions that need to be prioritised.



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