High Street UK 2020

What is the future for the UK High Street?

Executive Summary

Despite years of academic research, high street data and reports, as well as extensive media coverage, it seems to have had little effect; it is far from clear that retailers and local agencies responsible for managing change on the high street know how to respond effectively. The high retail vacancy rate in many locations reflects a complex set of causes – changes in the location of retailing (on-line and out-of-town), recession and consumers' need for convenience, to name just three.

Started in January 2014, our project High Street UK2020, has identified **198 other factors** that influence the performance of the UK High Street. In addition, we have also worked out how much influence a location has over these factor. As a basic rule of thumb, the more a factor influences the performance of a retail centre, the less that factor can be influenced locally. This means that centres have to do everything they possibly can to make a positive difference to all the factors they can influence.

We have now identified the top 25 priorities for local action for places wanting to increase footfall – a key performance indicator. Top of the list of actions is ensuring the centre is open at times the catchment want to visit. This involves coordinating opening hours – perhaps to meet the needs of commuters. It is not just retailing activity that attracts footfall – so the evening economy needs to be incorporated as part of the overall offer. Next on the list is improving the quality of the visual appearance of the centre. This includes some really basic activities like clearing up litter as well as improving the quality of the physical fabric. Third is ensuring the right type and quality of retailers are represented. How well does the retailer presence match the profile of the catchment? Has the local population changed – have the retailers kept up? The fourth priority is having a common vision for the centre and some leadership. This also means incorporating the vision of the town into planning documents – so that suitable development can happen and be resourced (when there is money). Finally, providing a consistent and suitable experience is important – in terms of image, customer satisfaction and levels of service quality.

Wrexham, one of 10 partner towns in the project, has found the project and the findings a useful way to focus efforts and resources. Having a clear set of priorities enables more stakeholders to play an active role in improving the vitality and viability of the town – as they can work in areas they feel they can influence, rather than, necessarily, getting involved in everything.

As well as identifying these priorities, our team is also modelling the future for the High Street. We have analysed over half a billion shopper movements, across 62 High Streets, over the last 3 years: data that was provided to us by Springboard. Another important finding, is our 2020 footfall prediction. Based on current trends, we think footfall will fall 10% by 2020. *This is much less than many High Street commentators have predicted*. Nevertheless, our analysis suggests that out of town retailing and losing footfall to other centres still represents a very real threat to many towns, much more than on-line retailing. The challenge to High Streets is how to act more collectively in response to these challenges. At present, many retail locations are occupied by retailers and other stakeholders who do not appreciate that it is *the location* that is attracting footfall – in other words the 'pulling power' of the collective offer – rather than any one particular retailer. This has meant coordinating important aspects of the offer, like opening hours, very difficult. Nevertheless, at the same time, each individual player has some effect on the offer – it only takes one or two operators, with poorly maintained premises to bring down the visual appearance of the whole street.

More details and findings so far from the High Street UK2020 can be found at http://www.placemanagement.org/special-interest-groups/managing-places/town-and-city-centresdowntowns/town-centre-policy-and-research/hsuk2020/

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PRIORITY	CONSIDERATIONS
1. ACTIVITY HOURS	Ensuring the centre is open when the catchment needs it. What are the shopping hours? Is there an evening economy? Do the activity hours of the centre match the needs of the catchment?
2. APPEARANCE	Improving the quality of the visual appearance, e.g. the public realm. How clean is the centre?
3. RETAILERS&SERVICES	Offering the right type and quantity of retailers and other service providers. What retailers and service providers (private/public) are represented?
4. VISION&STRATEGY	Having a common vision and some leadership. Do the High Street stakeholders collaborate? Is the vision incorporated in local plans?
5. EXPERIENCE	Considering the quality of the experience. Measuring levels of service quality and visitor satisfaction. What is the overall experience of the centre?
6. MANAGEMENT	Building capacity to get things done. Is there effective management – of the shopping centre(s) and town centre?
7. MERCHANDISE	Meeting the needs of the catchment. What is the range and quality of goods on offer?
8. NECESSITIES	Ensuring basic facilities are present and maintained. Is there appropriate car-parking; amenities; general facilities, like places to sit down and toilets etc.?
9. ANCHORS	The presence of an anchor which drives footfall. This could be retail (like a department store) or could be a busy transport interchange or large employer. What brings most people to your town?
10. NETWORKS & PARTNERSHIPS WITH COUNCIL	Presence of strong networks and effective formal or informal partnerships. Do stakeholders communicate and trust each other? Can the council facilitate action (not just lead it?)
11. DIVERSITY	A multi-functional centre. What attractions are there, apart from retail? What is the tenant mix and tenant variety?
12. WALKING	The 'walkability' of the centre. Are linked trips between areas possible – or are the distances too great? Are there other obstacles that stop people walking?
13. ENTERTAINMENT AND LEISURE	An entertainment and leisure offer. What is it? Is it

	attractive to various segments of the catchment?
14. ATTRACTIVENESS	The 'pulling power' of a centre. Can it attract people from a distance?
15. PLACE ASSURANCE	Getting the basics right. Does the centre offer a basic level of cleanliness, offer, customer service, is this consistent? Or do some operators, or parts of the offer, let this down?
16. ACCESSIBLE	Each of reach. How convenient is the centre to access? Is it accessible by a number of different means, e.g. car, public transport, cycling.
17. PLACE MARKETING	Communicating the offer. How does the centre market and promote itself? Do all stakeholders communicate a consistent image? How well does the centre orientate visitors and encourage flow – with signage and guides etc.
18. COMPARISON/CONVENIENCE	The amount of comparison shopping opportunities compared to convenience (usually in percentage terms). Is this sustainable? Does it match needs of catchment?
19. RECREATIONAL SPACE	The amount and quality of recreational areas and public space/open space. Is there places that are uncommodified? Where people can enjoy spending time without spending money?
20. BARRIERS TO ENTRY	Refers to obstacles that make it difficult for interested operators to enter the centre's/High Street's market. What is the location doing to make it easier for new businesses/service providers to come onto the High Street?
21.CHAIN VS INDEPENDENT	Number of multiples stores and independent stores in the retail mix of a centre/High Street. Is this suitably balanced?
22. SAFETY/CRIME	A centre KPI measuring perceptions or actual crime including shoplifting. Perceptions of crime are usually higher than actual crime rates. Does the centre monitor these and how does it communicate results to stakeholders?
23. LIVEABLE	The resident population or potential for residential in the centre. Does the centre offer the services/environment that residents need? Doctors, schools etc.
24. ADAPTABILITY	The flexibility of the space/property in a centre. Are there inflexible and outdated units that are unlikely to be re-let or re-purposed.
25.STORE DEVELOPMENT	The willingness for retailers/property owners to develop their stores. Are they willing to coordinate/cooperate in updating activities? Or do they act independently (or not at all!).

25 Top Priorities