



21st Century High Streets: A new vision for our town centres



21ST CENTURY HIGH STREETS

Recommendations	3
Introduction	5
Defining the High Street	6
Tough Times on the High Street	7
Policy Priorities for Action	9
1. A Unique Sense of Place	10
2. An Attractive Public Realm	13
3. Planning for Success	16
4. Accessibility	19
5. Safety and Security	22
6. Supportive Regulatory and Fiscal Regimes	25
Conclusions	28
References and Acknowledgements	29



Wrexham Town Centre at night



RECOMMENDATIONS

Even before the recession, some High Streets were ailing as shopping habits shifted. High class regional shopping destinations, the move to 'leisure shopping', more demanding shoppers and the growing importance of the internet all pose significant challenges to traditional High Streets. But it's not all doom and gloom. Some High Streets have found ways to buck the trend.

There is a bright future for High Streets as the focal point for local communities. Retailing will be an essential part of this future but is likely to have a changing role. Our twenty key recommendations to achieve the best possible future for our High Streets, set out below, draw on current successful practice.

1. A UNIQUE SENSE OF PLACE

1. Town centres are vital to local communities so we must work together to maximise the inherent advantages of each High Street's local heritage or natural surroundings whilst still providing facilities suitable for modern retailing.

Delivery Partners:
Local Authorities, Local Partnerships, Retailers, Cultural/Heritage Partners

2. The retail mix must complement the public perception of a High Street's identity.

Delivery Partners:
Local Authorities, Local Partnerships, Retailers, Landlords

3. High Streets must be marketed effectively – and deliver on that promise – so customers can appreciate the value of any given location.

Delivery Partners:
Local Authorities, Local Partnerships, Retailers, Cultural/Heritage Partners

2. AN ATTRACTIVE PUBLIC REALM

4. Developing and maintaining an attractive trading environment, with consistent styling, is essential.

Delivery Partners:
Local Authorities, Local Partnerships, Retailers

5. Public spaces must be maintained to the highest standards with effective deterrents against pollution.

Delivery Partners:
Local Authorities, Local Partnerships, Retailers

6. Local authorities, public bodies and private interests must work together to achieve material improvements, and public sector investment must provide long-term benefits.

Delivery Partners:
Local Authorities, Local Partnerships, Retailers

3. PLANNING FOR SUCCESS

7. Strategic planning must define the framework for different types of shopping destination within regional, sub-regional and local contexts.

Delivery Partners:
Local Authorities, Regional Development Agencies

8. Partnership and collaborative working lie at the heart of all successful retail-led regeneration.

Delivery Partners:
Central Government, Regional Development Agencies, Local Authorities, Local Partnerships and Retailers

9. Monitoring the health of town centres should underpin any effective town centre system.

Delivery Partners:
Central Government, Regional Development Agencies, Local Authorities, Local Partnerships

RECOMMENDATIONS

10. A clear strategy must be established to address increasing rates of vacancy and the accompanying decline in fortunes of some town centres.

Delivery Partners:
Central Government, Regional Development Agencies,
Local Authorities, Local Partnerships, Retailers

4. ACCESSIBILITY

11. Parking and transport policy should be seen as a way to attract customers to the High Street rather than simply a means of traffic management. It should aim to reduce town centre congestion and parking demands without affecting footfall. Incentives to use public transport should be offered, not penalties on motorists.

Delivery Partners:
Central Government, Local Authorities, Public Transport Operators

12. Car parks should not be used primarily as a means of raising revenue, and a proportion of funds raised should be ring-fenced to improve car parking options.

Delivery Partners:
Central Government, Local Authorities

13. Retail delivery curfews should be reconsidered, taking account of advances in technology.

Delivery Partners:
Local Authorities

5. SAFETY AND SECURITY

14. All retail crime and anti-social behaviour must be deterred, with damaged property and streetscape restored as quickly as possible.

Delivery Partners:
Central Government, Local Authorities, Police, Local Partnerships, Retailers

15. Achieving meaningful deterrence requires a co-ordinated response by all agencies in the community.

Delivery Partners:
Local Authorities, Police, Local Partnerships, Retailers

16. Neighbourhood policing must meet the needs of the local business community – Local Area Agreements and Strategic Assessments and Crime and Disorder Reduction Partnerships should include business crime among their key priorities.

Delivery Partners:
Police Authorities, Local Partnerships

6. SUPPORTIVE REGULATORY AND FISCAL REGIMES

17. A freeze on all new property and business rate burdens should be accompanied by the reinstatement of Empty Property Rate Relief.

Delivery Partners:
Central Government

18. The Business Improvement District (BID), or similar partnerships, should be the preferred mechanism for raising additional revenue to solve local problems.

Delivery Partners:
Central Government, Local Authorities, Private Sector Partners

19. The cost of complying with existing regulation should be immediately reduced, including the removal of any disproportionate parts of the regulations.

Delivery Partners:
Central Government, Local Authorities

20. Local authorities and the LBRO have a vital role to play in ensuring regulations are enforced without adding unnecessary costs.

Delivery Partners:
Local Authorities, LBRO



INTRODUCTION

We British were once famously dismissed as a nation of shopkeepers. It's an 'accusation' that we at the BRC are proud to live up to – retailing is one of the great success stories in the UK, and is at the heart of our towns, cities and neighbourhoods.

In these difficult times we are seeing High Streets up and down the country struggling to continue to provide essential services, jobs and a vibrant heart to the local community. For some the recession is accelerating a decline that was already evident. Elsewhere recent high profile retail failures have brought down previously functioning High Streets.



But there are also many examples of excellent practice where civic vision, leadership and judicious investment built on partnership have provided great environments in which to trade, shop and enjoy being part of your own community or to visit somewhere new. This report aims to share the lessons from these success stories to enable communities to shape a stronger future for their High Streets.

Good retailing is all about great products supported by great people giving great service. It's down to retailers to provide all of that for their customers. It's something British retailers, large and small, excel in. But to trade profitably we need customers, drawn in by a pleasant, safe and accessible High Street offer. This report is part of our contribution to help deliver a better, brighter future for High Streets everywhere.

Stephen Robertson
Director General
British Retail Consortium
July 2009

DEFINING THE HIGH STREET

In the UK today we can choose from an increasingly diverse range of shopping locations and channels. The choice spans town centres and out-of-town retail parks, neighbourhood shops close to home, and online and catalogue shopping. We shop in different ways – for basic necessities and luxuries, as a weekly routine, on impulse or as a leisure activity – so having the broadest range of shopping channels for maximum flexibility and convenience is fundamental to modern lifestyles.

This report looks at what makes a High Street a great visiting and shopping experience, whether it carries local shops or flagship stores. It also recognises that a High Street is more than a shopping location, playing a crucial role at the heart of the community. As our communities continue to evolve, the High Street of the 21st Century is likely to be a very different place to that of 20 or 30 years ago, and the recession may hasten the demise of outmoded High Streets much faster than new retailing, entertainment, cultural, civic and other services can move in to re-invigorate it.

Declining High Streets are at best unattractive, discouraging shoppers; at worst threatening. We explore how the re-birth of the High Street can be achieved to benefit customers, communities, retailers and other businesses and services that operate alongside them.

A lot of work has already been carried out by the Government, public bodies, academics and the private sector to investigate the nature of town centre locations. Reports such as *Vital and Viable Town Centres: Meeting the Challenge*¹ identified broad classifications

aimed at categorising different types of locations. The Association of Town Centre Management (ATCM) proposes the following essential characteristics as being at the heart of every town centre:

- A retailing centre that serves the needs of the local community;
- Leisure, entertainment and cultural facilities;
- Public and private sector services;
- An employment and business sector;
- Accessibility by a choice of transport;
- The perception of the local community as their town centre.

Clearly High Streets in the UK encompass a very broad range of shopping locations. They include high profile regional city shopping destinations as well as neighbourhood shopping centres within larger conurbations, local town centres, market towns and cultural and historic destinations. We propose to take the following definitions as the starting point for this report.

1. Destination/regional/national city centre
2. Local town centre
3. Neighbourhood
4. Market towns
5. Historic/cultural destinations

As this report will show, while there is considerable diversity in the needs of these different types of High Streets, many of the basic issues they face and the actions needed are essentially similar.



TOUGH TIMES ON THE HIGH STREET

Some High Streets have been struggling for years, lacking the investment or the vision to offer customers a compelling choice and so failing to compete with better experiences in neighbouring towns or retail parks. The recession has exacerbated these problems but has also spread these difficulties more widely. This section explains how economic difficulties have brought the challenges facing High Streets into sharper focus.

The UK economy contracted sharply in the first three months of 2009, with output falling by 2.4%, the worst contraction since 1979. It is predicted to fall by 3.5-3.9% by the end of 2009 with consumer spending shrinking by 3.4% in 2009 and 0.4% in 2010. Real household disposable incomes are forecast to rise by only 1.6% in 2009 and 0.9% in 2010².

CONFIDENCE

Customer confidence began to falter in the summer of 2007 and the contraction continued through rising global commodity prices and falling property prices. Perhaps surprisingly neither the banking crashes in the autumn of 2008 and associated credit restrictions, nor the growing job losses in early 2009 have eroded confidence further, but these events have prevented any significant recovery from a historically low level. The significant fall in mortgage payments and energy costs would otherwise have prompted a rise in spending as pressures on household budgets eased.

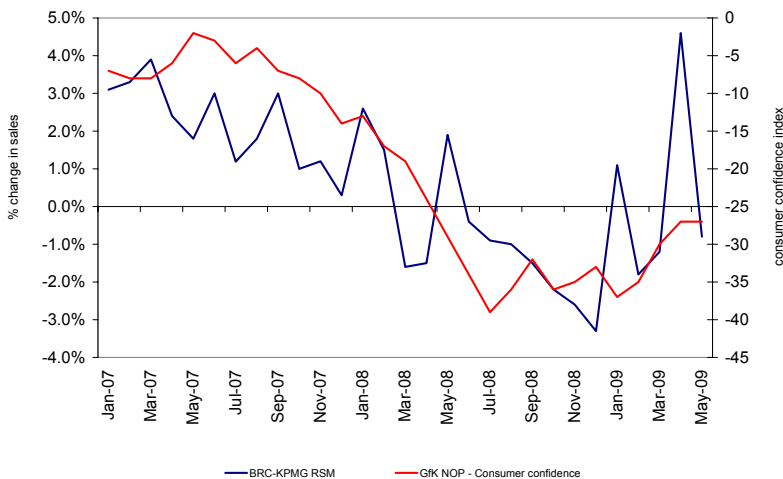
Customer confidence is a leading indicator of recession and recovery so measures to underpin and nurture confidence are essential to turn things round. In spring 2009, while 40% of consumers were directly affected by the recession (through loss of jobs, overtime or bonuses etc) a much higher 70% cut back on spending due to fears of what might happen. Customers are both cautious about spending on big items and very price conscious in making routine purchases.

SALES

Sales are as much driven by confidence as the value of the products offered. The BRC-KPMG Retail Sales Monitor shows total and like-for-like sales following the same relentless downward path as consumer confidence since the summer of 2007. After a prolonged period of restricted spending there was a brief upward kick in January 2009 as consumers took advantage of massive discounting by retailers to make replacement purchases that had been put off for months. There was further positive sales data in April, but comparisons are particularly difficult with Easter falling in April 2009 and March 2008. In May sales dropped back again.

Food sales have seen some growth in total value, driven by food inflation resulting largely from the deterioration in the value of sterling, benefiting convenience stores and supermarkets. But many of the shops found on the High Street have suffered

BRC-KPMG Retail Sales Monitor and Consumer Confidence



prolonged and significant falls in sales. Big ticket furniture, carpet and floor coverings and homewares sales are largely driven by house purchases and the availability of credit and so are unlikely to recover ahead of the housing market. On the other hand beauty products and young fashion have fared relatively well.

COSTS

Products, property and people are the major costs in retail. World commodity prices were high in the summer of 2008 and UK prices have continued to rise as sterling has lost over a quarter of its value against the dollar and the euro since July 2007. This affects many non-food items, a significant proportion of which come from the Far East. The reduction in VAT rates gave a 2% reduction in prices but this will end on 31 December 2009 when the 17.5% rate resumes.

Retail property costs rose sharply during the high growth years and, while new leases are often on significantly better terms, remain high at levels completely unconnected with current sales or profitability for many retailers. Since business rates are connected to rental values, and the 2010 Revaluation is based on April 2008 levels (i.e. before the recession started, officially) these rising costs will exacerbate the situation. The loss of Empty Property Rate Relief and the threat of Business Rates Supplements add further to this effect.

People costs have been squeezed by these compounding pressures, initially by reducing the hours worked but increasingly through job losses.

(In March 2009 there were 73,000 fewer jobs in retail year-on-year, a reduction of 2.5% in 12 months, according to NOMIS). The final level of job losses will be determined by other cost pressures including the impact of legislation, regulatory burdens and taxation (including National Insurance).

PROFITABLE TRADING

Rising costs, falling sales and downward pressure on prices has left retailers with squeezed margins and loss of profits. In some cases this has led to business failures or significant contractions, leaving empty stores and lost jobs and services. Elsewhere planned investments are no longer viable and capital to invest is harder to come by. Vacant premises are forecast to more than double, from 7% at the start of 2009 to around 15% by the year end. Some town centres already record vacancy rates of almost 40%. Retailers entering administration are up 109% year-on-year and 48% quarter-on-quarter according to the Insolvency Service.

The dangers associated with this deteriorating picture are clear. Vacant units are perhaps one of the most visible impacts of the economic downturn. Shoppers who are unable to ignore increasingly visible vacant units in their local communities are likely to further reinforce falling consumer confidence. This may in turn lead to increasingly conservative spending habits which could, in turn, lead to a falling retail spend.





POLICY PRIORITIES FOR ACTION

High Streets face long-standing challenges which need to be addressed by all the businesses that operate in them if shops, restaurants, pubs and other local businesses and public services are to retain viable long-term futures. The economic downturn is exacerbating these difficulties.

A range of Government bodies and others are now looking to develop solutions to address this deteriorating picture. The Department of Communities and Local Government called a summit to discuss the challenges facing town centres across England. The Scottish Government set up a Town Centre Regeneration Fund to provide much needed funding to improve towns and cities across the country. The Local Government Association called for urgent action to allow local authorities to address the difficulties which are developing.

The priority must not be simply to develop short-term solutions to short-term difficulties. Instead a concerted effort must be made to put in place a long-term strategy to ensure the long-term future of our High Streets. A successful future cannot be provided by attempting to reconstruct the past.

The aim of our report is to contribute to these initiatives by:

1. Identifying the main short- and long-term challenges facing High Streets;
2. Identifying effective solutions to those challenges;
3. Developing a strategy to address these challenges and deliver prospering High Streets.

We have identified the following key elements of a successful High Street:

1. A Unique Sense of Place
2. An Attractive Public Realm
3. Planning for Success
4. Accessibility
5. Safety and Security
6. Supportive Regulatory and Fiscal Regimes

In each, action is needed urgently to ensure the long-term viability of town and city centres across the UK. Our overriding aim has been to ensure High Streets are attractive places for customers to shop and for retailers and other local businesses and services to operate.

This report examines the current challenges and the efforts to address them. Each section identifies examples of initiatives that are successfully addressing some of the most pressing problems. Adopting solutions such as these more widely could help rejuvenate High Streets across the UK.

A UNIQUE SENSE OF PLACE

Well-loved town centres have a unique identity which marks the character of the community they serve. They may be centred around an historic feature, a market place or town hall. The streets may be narrow and winding or laid out to a more modern design, but each has its own character. The retail offer will often consist of familiar and popular brands mixed with independent and niche stores but what makes a High Street special are the ways it defines its own environment – the street scene and the links with the community's past and future.

An area's character – its “sense of place” – can strongly influence shoppers' decisions about when, why and how often they visit a High Street. Research being carried out at Loughborough University appears to confirm this is the case³. The key elements of an effective sense of place are:

- **Building on existing strengths:**
As observed in recent research⁴, it is vital High Streets maximise the inherent advantages of heritage features or natural surroundings. The distinctiveness of many town and city centres is an asset, not an impediment. New development can be complementary to existing features rather than seeking to homogenise surroundings.
- **Appropriate retail diversity:**
Ensuring an appropriate retail mix, both in diversity of store and choice of retailer, is essential. Each High Street and community needs its own mix. Larger city centre locations will be best placed to provide a wide range of competing retailers. Smaller locations may elect to attract shoppers through a more concentrated but diverse offer. In these areas two or three ‘anchor stores’ such as a supermarket, pharmacy or other essential facility are important in attracting enough footfall to create a bustling atmosphere and keep other stores in business.
- **Ensuring a complementary retail offer:** At the same time, the retail offer has to match public perception of the High Street's identity. Only by providing the right products and services for local needs can a High Street succeed. Shops must be aligned to the customer base in terms, for example, of age, ethnicity and income. Similarly, products and services must fit the leisure and cultural activities in the area.
- **Marketing and delivering High Street identity effectively:**
Communication and marketing are key elements in developing an effective sense of place. People living within reasonable travelling distance need to be able to recognise and identify the essential nature of a High Street. Appropriately tailored events can play a vital role in supporting and enhancing identity. Themed markets or other activities can attract customers. Loyalty schemes rewarding use of retail, entertainment and cultural facilities also help establish and maintain a distinct local identity.



Swansea Independents' Day



Case Study

PLYMOUTH'S SUMMER FESTIVAL

THE ISSUE

The Plymouth Summer Festival is an initiative conceived by the local BID partnership, the City Centre Company, to address the need for co-ordinated regional marketing of the city's summer events programme.

THE INITIATIVE

The Summer Festival targets day visitors through improved marketing of summer events. Building on the fact that market research suggests every tourist pound generates 35p for the retail sector, the BID created a new festival brand that packaged 25 major

events including arts, music, maritime, food and sporting activities in the city centre, waterfront and subsidiary venues. A website, 100,000 brochures and bus, radio and print advertising were used to promote activities and the city centre was decorated with 350 lamppost banners and pennants.

THE OUTCOME

Feedback on the project has been extremely positive. Research concluded that 75% of visitors were aware of the festival and 48% had visited specifically for an event. Research indicated that over 300,000 additional day visitors were attracted during the four months of the festival. The average visitor spend during the period was £92, £40 higher than the regional average.

Case Study

HUDDERSFIELD'S MARKETING PROGRAMME

THE ISSUE

Promoting and supporting the retail and business offer in Huddersfield town centre, seeking to build a distinctive identity from nearby regional centres.

THE INITIATIVE

The marketing programme conceived by Huddersfield Town Centre Partnership comprises:

- A quarterly women's magazine exclusively featuring local events and products. 20,000 magazines are distributed each quarter.
- A quarterly newsletter informing businesses about events in the town.

- Definitive Guide (aimed at students and visitors) promoting shops, cafes and bars updated annually.
- Fortnightly networking meetings encouraging local companies to do business with each other.

THE OUTCOME

Feedback from businesses in the town has been extremely positive and membership of the Partnership has grown significantly to 175 members. Research indicates readers find 80% of the features in the magazine of interest. The main Food and Drink Festival attracts over 40,000 visitors, including a significant number from outside the immediate catchment area.

Case Study

SWANSEA 'INDEPENDENTS DAY'

THE ISSUE

Ensuring shoppers continue to be attracted to Swansea city centre by capitalising on the character and diversity of its offer.

THE INITIATIVE

Swansea 'Independents Day' was conceived by Swansea BID and the City Centre Partnership to celebrate the character and diversity that independent traders bring to the city centre, helping to keep it a vibrant and distinctive shopping

environment. Taking place on the 4th July each year, the city centre adopts an American Independence theme, with key sites coloured red, white and blue. A catwalk show takes place throughout the day showcasing retailers' products. Independent cafes, bars and restaurants sell American themed food and drinks and 10,000 brochures are produced with special offers from independent retailers in the city.

THE OUTCOME

Feedback from independent businesses has been very positive. Evidence shows that the city centre doubles its footfall on the day of the festival and the Independents Day brand is recognisable across the city.

Case Study

DUNDEE RETAIL AWARDS

THE ISSUE

Recognising the substantial developments made by the retail, leisure and business sectors in Dundee City Centre and to highlight the retailing provision which has evolved over the last 10 years.

THE INITIATIVE

Piloted in 2006, Dundee City Centre Retail Awards were set up by City Centre Management to showcase all aspects of the city centre. National and independent judges shortlist winners in seven of the eight award categories – the judges' choice

accounting for 50% of the vote, with public votes (via a telephone hotline, postcard voting and online voting) responsible for the remaining 50%. The final category, Consumers' Retailer of the Year, is chosen by the public.

THE OUTCOME

Now in their fourth year, the awards have continued to grow in profile, with ever-increasing nominations to celebrate the excellence within Dundee's diverse and vital retail sector. The hard work by the panel of judges and the backing of sponsors has helped ensure the success of the awards, which are celebrated at an annual evening event.



2 AN ATTRACTIVE PUBLIC REALM

Developing and maintaining an attractive trading environment is crucial to the success of a High Street. Customers, employees and businesses must feel a High Street is safe, welcoming and clean. While there will be differences of scale depending on the type of High Street, a thriving public realm will typically include:

- **Social spaces:**
Spaces that allow people to shop, eat, relax, socialise and play are fundamental.
- **Distinctive places:**
Use of the urban landscape, sympathetic planting and higher quality construction materials can all greatly enhance the experience of people using those areas.
- **Effective signage:**
Signposting should enable visitors to orientate themselves quickly and easily. Signage and maps, as well as different pavement materials, can combine to give consistent and comprehensive guidance over a wide area.
- **Appropriate street furniture:**
There should be minimum clutter to ensure people receive clear signals. Consistency of styling and hiding some services from view can help. Public art can provide an inspiring focal point.

- **Good quality lighting:**
Lighting from various sources including street lights, bollards and shop windows can enhance perceptions of safety and quality of appearance but the need for lighting should be balanced against sustainability considerations.

The priorities for achieving these goals are outwardly straightforward. First and foremost, each High Street needs to be well designed. Once in place, the public realm needs to be maintained to very high standards. Streets must be kept clean and people deterred from littering or anti-social behaviour.

Sustainability is a key consideration. People should be given a range of transport choices to drive down pollution. Safety, and perceptions of safety, are an essential part of any public realm. Its attractiveness is an integral consideration and every High Street must be accessible to the widest possible number of users.

The aims of such improvements will only be achieved through co-ordinated activity between local authorities, public bodies and private interests. It is vital businesses are given a key role in ensuring public funds are spent wisely to ensure the maximum long-term benefit.



Belfast's Streets Ahead Project

Case Study

IMPROVING EDINBURGH'S WORLD HERITAGE STATUS

THE ISSUE

Improving the city centre environment in the midst of £500 million of infrastructure works (tram line installation).

THE INITIATIVE

A major services infrastructure was installed in advance of new tram lines in Princes Street. While this is a significant investment for the city, the disruption has had a major impact on the environment, accessibility, transport flows and retail footfall. Essential Edinburgh, the city centre BID, started a contract for 'clean teams' to tackle fly posting and graffiti and introduced information

'ambassadors' to help tourists and workers find their way around the city. This contract represents about a third of the budget for the BID.

THE OUTCOME

Within three weeks there was no evidence of fly posting in the BID. An agreement has been reached with the Council to undertake a jointly funded graffiti removal initiative with the BID responsible for ongoing maintenance. Having recognised two of the three main streets in the BID are affected by the infrastructure works the third, Rose Street, has become a focus with over 30 tiered planters. Thousands of people have been assisted by the information wardens while the cleaning has led to a whole range of petty and serious crimes being reported to the police. As a result Edinburgh city centre is cleaner and safer.

Case Study

REFURBISHING WORCESTER'S HIGH STREET

THE ISSUE

Updating Worcester's town centre.

THE INITIATIVE

An audit carried out in consultation with Worcester's retailers and other interest groups identified the need for significant improvements to the city's High Street. Particular problems were identified in relation to ease of access and impaired visitor circulation. The new scheme, funded by £1.65 million from local authorities, aimed to simplify the

overall design, overhaul and relocate street furniture, and improve accessibility to shops and businesses for people with disabilities. While construction was underway drainage and electrical cables were re-laid to improve infrastructure. Trees and shrubs were replaced to enhance landscaping.

THE OUTCOME

The project is widely acknowledged to have significantly enhanced the ambience of the main shopping area, capitalising on the attractiveness of much of the existing streetscape while remaining sympathetic to heritage buildings. The whole area is easier for pedestrians, delivery vehicles, cleaning and maintenance.



Case Study

KINGSTON-UPON-THAMES BID'S 'CLEANER STREETS' INITIATIVE

THE ISSUE

Rapidly making a difference to the cleanliness of Kingston-upon-Thames town centre following creation of its BID.

THE INITIATIVE

As soon as Kingston First BID won its ballot it embarked on a clean-up operation. Initially this work was carried out in-house by the BID's own employees. Subsequently these services have been

contracted out, with a team of environmental 'rangers' on patrol seven days a week supported by two street cleaning vehicles. A third of Kingston BID's budget is given over to the 'Cleaner Streets' initiative.

THE OUTCOME

Over 44,000 square metres of footpaths were cleaned in the first stage, with an additional 6,000 square metres in the following phase. The programme included treating street furniture with anti-graffiti coatings and removal of chewing gum. In total, 20 tons of fly-tipped rubbish was removed. This established a baseline for regular service provision.

Case Study

BELFAST'S 'STREETS AHEAD' PUBLIC REALM IMPROVEMENT PROJECT

THE ISSUE

Transforming Belfast City Centre.

THE INITIATIVE

The lack of cohesion of Belfast City Centre and the prolific use of relatively poor quality materials had created a fragmented and dated main shopping area. However, significant investment is being made in the city's streets and public spaces. The Department for Social Development is sponsoring a £28 million

regeneration project involving 14 main shopping streets in the heart of the city. This involves new granite paving, new and improved seating, bins, lighting and trees, as well as new public artworks.

THE OUTCOME

Upgrading the streetscape is widely recognised to have made a significant improvement to the heart of the city. It is acting as a catalyst for the regeneration of the city, bringing new investment and employment by attracting new businesses. Existing retailers have been encouraged to invest in upgrading their premises. The improved streetscapes attract more tourists with improved lighting making the city centre safer with well-lit and active streets.

3 PLANNING FOR SUCCESS

Developing and implementing a clear vision is essential to delivering a sense of place and an attractive public realm. It also underpins all the other factors which go to make successful High Streets. Strategic planning needs to set out the framework for different types of shopping destination within national, regional, sub-regional and local contexts. Effective planning will also, crucially, help businesses make informed decisions about investment in the areas concerned. Transformation of High Streets occurs when the public and private sectors share a vision and combine resources in delivering it.

Retailing is widely accepted as having a key role in regeneration projects, including in some of the UK's most deprived High Street areas. Regeneration may encompass the rebuilding of an urban centre or, at a more localised level, may transform the appearance of a smaller selection of streets. At the micro-level it may simply refer to the refurbishment of a small number of shop frontages⁵.

The benefits delivered by retail-led regeneration include:

- **Goods and services:**
Regeneration projects with a substantial retail dimension will provide improved access to goods and services for people living within the catchment area of the project.
- **Employment:**
Retailing and associated services make an extremely important contribution to employment, including many entry-level jobs. These benefits extend well beyond the new shops themselves. For every 100 retail jobs created nationally, an additional 50 indirect and induced jobs will be created elsewhere⁶.
- **Community/Social:**
The social benefits of retail regeneration are significant⁷. Additional employment can help address social exclusion in the areas concerned.

People working in new businesses gain improved skills and career opportunities. Many regeneration projects, in renewing the heart of the community, improve access to health services, leisure facilities and reduce the cost and time of travel to access essential goods and services. This can, in turn, encourage further investment.

Partnership and collaborative working lie at the heart of all successful retail-led regeneration projects. Town centres are assets which need to be managed and we need to focus on centres which are already at, or approaching, "tipping points" rather than waiting to tackle the much more difficult task of High Streets already in decline. Prevention is better than cure and generally requires lower investment. A programme of monitoring the 'health' of town centres is also crucial to effective strategic management.

Equally importantly, the relationship between retailing and other sectors of the economy must form the basis of strategic planning. Regional Spatial Strategies (RSS) must co-ordinate plans for retail development, housing, economic development and transport so the right services are being created in the right places. In the past many RSSs have fudged the question of hierarchies in order to avoid blighting towns not chosen as centres of development. But this has led to uncertainty and missed opportunities as each town attempts to provide the same offer, and fails to build on its particular strengths in meeting the needs of its community.

All this needs to be underpinned by good data on service and employment needs and existing provision within an accessible area, together with sustainability metrics including customer and delivery travel data, energy usage in new and old properties, and social inclusivity. Changes in public perception of different High Street locations should also be measured. Provided it is viewed in the context of whether neighbouring High Streets are growing or contracting this data can prove enormously valuable in informing strategic planning and shaping the vision for the future.



Case Study

PROVIDING DORCHESTER WITH A TOWN SQUARE

THE ISSUE

Making a positive contribution to retail, entertainment and living development in Dorset's county town.

THE INITIATIVE

Research identified a substantial gap in non-food spending in Dorchester. However, new retail opportunities in the town centre are extremely limited. Development specialists Waterhouse Company identified vacant historic buildings on the former brewery site which would provide the basis for a substantial new development comprising 45 shops and restaurants, a cinema, apartments, offices, hotel, theatre and arts centre. Dorchester

also benefits from having a newly formed Business Improvement District (BID) promoting the existing historic county town and well placed to assist in the future prosperity of the Brewery Square development.

THE OUTCOME

Although too early to judge its success, construction is underway and the development has attracted national press attention. The focus of the development is a town square with fountains surrounded by cafes – a feature the town currently lacks – with a mixture of refurbished historic buildings and modern additions designed to create a distinctive character. Making sure it complements and enhances the town's existing character has been a key consideration from the start.

Source: Medium-Sized and Smaller Towns: Raising the Game, British Council of Shopping Centres 2009

Case Study

THE ROCK RETAIL AND LEISURE DEVELOPMENT IN BURY

THE ISSUE

Expanding and improving the vitality and viability of Bury town centre by enhancing the retail and leisure mix.

THE INITIATIVE

A partnership agreement between Thornfield Developments and Bury Council was part of the 2003 'Bury But Better' town centre development strategy to expand the shopping centre, provide

links to Bury markets, a new department store and other leisure facilities. At its heart is a £330 million scheme comprising 750,000 sq ft of mixed use development. The scheme, which almost doubles the town's retail space, includes two department stores, 60 other shops/leisure outlets, a 10 screen cinema, 400 apartments, a 1250 space multi-storey car park along with restaurants and new public spaces.

THE OUTCOME

The scheme, which will open in summer 2010, is expected to significantly improve the vitality and viability of the town centre, providing good links, new uses, a better retail and leisure offer and diverse family facilities.

Case Study

WREXHAM TOWN CENTRE STRATEGY AND ACTION PLAN – DELIVERING RETAIL-LED RENAISSANCE

THE ISSUE

Studies showed that Wrexham was leaking spend to neighbouring towns and cities and that, in particular, ladies fashion was under-represented at the high end of the market. There were no vacant premises to attract the required department store to take Wrexham higher in the retail rankings.

THE INITIATIVE

Following the relocation of a supermarket to a new build elsewhere in the town centre, an eight acre

site owned by Wrexham County Borough Council became available for re-development. Developers were appointed in May 2004 to build a mixed use development anchored by a department store and entertainment facilities. The site links to the rest of the town centre via two entrances, one over a footbridge from High Street to Eagles Meadow.

THE OUTCOME

The new development was opened in October 2008 and is currently 90% let. Six months after opening the town centre is vibrant and busy with high footfall and spend. A number of new businesses have opened in premises vacated following relocations.



Wrexham Town Centre



4 ACCESSIBILITY

Attracting footfall is essential to retail success so easy access for shoppers, retail staff and deliveries is a must. Weak transport links and inadequate parking provision threaten the viability of high street retailers. Expensive, remote or insecure car parking, poor public transport, badly designed charging schemes and delivery restrictions deter visitors, curtail visits and stifle business potential. This, in turn, deters long-term retail investment.

Parking and transport must be managed together to support town centre development. Insufficient parking provision and poor accessibility greatly undermine the viability of High Street shopping. Frequent public transport direct to the centre, as well as innovatively managed park and ride schemes, can reduce town centre congestion and parking demands without adversely affecting footfall. Parking fines should be viewed as a symptom of systemic failure rather than a revenue raising mechanism.

Car parking facilities have a vital role to play. They should provide sufficient spaces for visitors and not be used primarily as a means of raising revenue. Free parking, at least at lower demand periods, and charging on exit encourage more frequent and longer visits. A proportion of revenue should be ring-fenced to provide improvement in the quality of car parking in the town – improved security, lighting, landscape management, signage and, ultimately, increased and improved parking provision.

Ease of delivery is particularly crucial. The challenge for retailers is to balance the need to reduce costs and streamline operations with the need to have high quality products available at all times. In striving to ensure their supply chain is as efficient as possible, retailers make a conscious effort to avoid traffic congestion and similar considerations. They avoid peak travel by making use of the road at night. However, store access in High Street areas is often restricted by delivery curfews as a result of planning restrictions put in place when stores were built. Almost a third of retailers say they are affected in this way. Unfortunately curfews often fail to take adequate account of advances in technology that have led to significantly quieter deliveries in recent years. In the light of this, local authorities should reconsider delivery curfews on a case by case basis.

Congestion represents a significant cost to retailers who rely on the road network for access to customers, staff and the transport of goods so effective policies to reduce congestion must go hand-in-hand with steps to improve accessibility by other means.



Case Study

DEALING WITH DECLINING FOOTFALL IN CHESTER CITY CENTRE: 'FREE AFTER 3'

THE ISSUE

Addressing a decline in afternoon footfall in Chester.

THE INITIATIVE

Market research carried out on behalf of Chester City Centre Management team confirmed that footfall declined after 3pm. Further analysis revealed that the decline could be explained by the absence

of local shoppers deterred by the cost of car parking. While the local authority indicated that car park revenue could not be completely abandoned, the City Centre Management team secured agreement that the two major car parks would be made free after 3pm every day.

THE OUTCOME

The impact of 'Free After 3' has been dramatic. Overall footfall has returned in line with national patterns. It has also improved interaction between local businesses and the City Centre Management team and similar initiatives have been successfully adopted in a number of other towns and cities.

Case Study

WARWICK'S 'FREE RIDE FRIDAY'

THE ISSUE

Addressing a reduction in town centre car parking in Warwick.

THE INITIATIVE

The closure of a town centre car park during the construction of a new bus centre was a considerable cause for concern among Warwick retailers and led to deteriorating relations between businesses and the local authority. To address the problem, the County Council approached a large local employer based in a business park outside the town centre about providing a free bus on Friday lunchtimes to

bring employees into the town centre to shop and eat. Working with the local Town Centre Manager, the 'Free Ride Friday' service was promoted with employees at the company concerned.

THE OUTCOME

Following the introduction of the new service, local traders reported increased footfall. At the same time, the company said its employees felt the scheme had a positive impact on morale. The company now pays for the bus service. The scheme has also been adapted elsewhere in the town, where a reduced price return lunchtime bus ticket is available to employees working in another local business park. Initial evidence shows that the benefit to the town centre clearly outweighs the cost of providing the services.



Case Study

BARNET'S SEASONAL PARKING SCHEME

THE ISSUE

Ensuring town centre accessibility during Christmas and New Year 2008.

THE INITIATIVE

Christmas and New Year is a vital trading period for many retailers. It is also the time of year when household budgets are under greatest pressure. Recognising this Barnet Council introduced a temporary reduction in the cost of parking throughout the borough. For the period from 20 December to 4 January, the Council reduced the

cost of parking in all 15 of its off-street car parks and in pay-and-display bays. The typical hourly rate was reduced from £1.50 to 10p. On street pay-and-display parking was set at 10p for an hour and 50p for two hours. The cost of all day parking in off-street car parks was limited to £1. The council estimates the initiative cost around £170,000.

THE OUTCOME

The Council carried out occupancy surveys to monitor the impact of the initiative. Analysis showed that short term parking increased significantly during the period of operation, with some car parks showing a 35 per cent increase in occupancy. Feedback from local businesses also indicated increased footfall.



5 SAFETY AND SECURITY

Shoppers will not be attracted to a High Street if they feel unsafe. This will be most acute in areas where they personally witness crime, particularly attacks on shoppers or shop staff, or the after effects of crime such as graffiti or vandalism, so it is important both to deter and address all forms of retail crime and anti-social behaviour, and to restore damaged property as quickly as possible. Ancillary areas such as car parks must also be considered safe for people and vehicles.

To ensure a safe and secure High Street there needs to be:

- Carefully designed street scenes, using the principles of Secured by Design, including good lighting and overlooked areas;
- Well designed shops with appropriate layout, trained staff and security equipment;
- A co-ordinated response to tackling business crime;
- Intelligence and information sharing (including CCTV images where appropriate) through a police/business/town centre partnership;
- Visible policing, community wardens and other security measures in proportion to local risks;
- Appropriate management of the night-time economy, including good public transport;
- Rapid reinstatement of any damage to shops, street furniture or facilities;
- Effective use of existing measures such as Anti-Social Behaviour Orders and Exclusion Notices.

In addition to driving away customers, retail crime costs the sector over £1 billion annually⁸. Police statistics suggest this is rising as the recession bites and High Streets experiencing rapid increases will quickly move into a spiral of decline as shops close and criminals move in. To minimise the impact of criminal activity, retailers make substantial investments in detection equipment to protect shoppers and staff alike but real deterrence requires a concerted effort by all agencies.

Local partnerships such as BIDs and Town Centre Management schemes can put in place initiatives to address retail crime. Retailers can offer space for local police officers to complete paperwork, so they maintain a visible presence in the community, reassuring residents, employees and shoppers while deterring offenders. Some retail staff voluntarily give up their own time to participate in Shopwatch schemes, acting as volunteer officers in town centres and retailing areas.

Neighbourhood policing should meet the needs of the local business community. It is important that good information is established on the types of crime affecting an area to ensure neighbourhood policing teams engage most effectively with businesses. Local Area Agreements and Strategic Assessments, and Crime and Disorder Reduction Partnerships (CDRPs) should include business crime among their priorities, alongside other crimes such as drug dealing which also impact on retail crime.

Problems associated with alcohol-related disorder can also have extremely serious implications for High Streets. Experience has shown this to be a multi-faceted problem that needs concerted action by the police, trading standards, retailers and pubs and clubs to reduce problems associated with the night-time economy.



Falkirk's Taxi Marshalls at work



Case Study

COMMUNITY ALCOHOL PARTNERSHIPS

THE ISSUE

Effectively tackling under-age drinking in the community.

THE INITIATIVE

Community Alcohol Partnerships (CAPs) are being introduced across the UK to address under-age drinking through education, enforcement and public perception. CAPs were first piloted in St Neots in Cambridgeshire and many more are now underway including a county-wide initiative in Kent. CAPs are designed to co-ordinate action between the police, local authorities, schools, local media and retailers.

THE OUTCOME

CAPs have shown that significant progress can be made through more effective enforcement of

legislation and have demonstrated the success of adopting a collaborative approach to alcohol-related crime. Findings from the St Neots pilot showed:

- 42 per cent fewer anti-social behaviour incidents
- 94 per cent fewer under-age people found in possession of alcohol
- 92 per cent less alcohol-related litter at key hotspot areas

The experience has shown CAPs to be cost neutral compared with the historic approach to enforcement. They also lead to significantly improved relations between retailers and the enforcement community. Roll out is supported by all three main political parties.

Case Study

A MORE EFFECTIVE APPROACH TO BUSINESS CRIME IN STAFFORDSHIRE

THE ISSUE

Ensuring consistency in service delivery to businesses by local crime partnerships in Staffordshire.

THE INITIATIVE

Historically there were seven separate Business Crime Reduction Partnerships across Staffordshire; with each partnership at a different stage of development and working independently of each other. Partnerships Against Business Crime in

Staffordshire (PABCIS) was formed to bring the partnerships together, while allowing them to retain separate operations. The aim of PABCIS was to develop a more consistent approach to business crime reduction across the county.

THE OUTCOME

An intelligence sharing system was put in place and two more partnerships were established to provide crime reduction coverage across the county. PABCIS was able to ensure a consistent approach to partnership working therefore encouraging greater support from the police, other key partners and the business community. The approach led to acceptance and understanding by local Chambers of Commerce of the benefits and effectiveness of proper structured Business Crime Reduction Partnership.

Case Study

SAFER NEIGHBOURHOODS BUSINESS ENGAGEMENT PROGRAMME

THE ISSUE

Securing more effective engagement between the police and businesses in London.

THE INITIATIVE

The Safer Neighbourhoods Business Engagement Programme (BEP) was set up to deliver more effective interaction between the Metropolitan Police and businesses in London. The BEP was delivered through the establishment of Safer Neighbourhood Teams (SNTs). The project aimed

to improve contact between businesses and SNTs, encouraging participation in local networks and partnerships. In doing so, it intends to establish clear business priorities and promote a partnership approach to problem solving. The measures are aimed at improving staff perceptions of safety in the local area and to increase confidence that police are identifying and tackling business crime.

THE OUTCOME

Surveys carried out by the local networks first established a baseline of local business priorities and the basis for a prioritisation of problem solving. Recent surveys revealed the BEP approach has made concrete progress towards achieving its aims.

Case Study

COMMUNITY SAFETY IN FALKIRK AT NIGHT

THE ISSUE

Tackling the issue of safety, crime and anti-social behaviour in the night time economy.

THE INITIATIVE

With the forthcoming opening of one of Scotland's largest nightclubs (capacity over 2,500) in the heart of Falkirk town centre it was identified by the Falkirk BID Steering Group that the introduction of Taxi Marshals as a demonstration project in the lead up to the BID ballot would help convince businesses it was a worthwhile use of levy funds. A successful application to the Scottish Government's Safer Streets budget enabled the pilot scheme to

be implemented. After the 3 month trial, there had been no incidents whatsoever reported to police at the main town centre taxi rank whereas incidents were regularly reported prior to the Marshals' introduction. The success of the pilot scheme was met with full support from businesses, taxi drivers, the police, Falkirk Council and, most importantly, users of the service.

THE OUTCOME

Following a successful BID ballot, and the opening of the nightclub, the Falkirk BID had earmarked sufficient funds in the budget to facilitate the Taxi Marshals scheme on a 'seasonal' basis. Successful applications for additional funding have now ensured the scheme is operational every weekend of the year. The significant investment has been justified by positive feedback.



6 SUPPORTIVE REGULATORY AND FISCAL REGIMES

A thriving High Street needs thriving shops, cafes and other local businesses. Many of the costs that affect profitability are driven by central and local government. Business rates and regulatory compliance costs are particularly key for retailers and other High Street based services.

Retailing is a property intensive sector with location crucial to footfall but high visibility sites attracting high rents and business rates. As a result retailing pays around three times its share of business rates – about one quarter of the total despite representing just 8% of gva GDP – amounting to a total bill of around £5 billion in 2007/08. Central government decisions could add significantly to this by 2010/11 due to:

- Annual uplifts
- Revaluation 2010
- The abolition of Empty Property Rate Relief
- The introduction of Business Rate Supplements

To ease the burden on retailers there needs to be a freeze on all new property and business rates and the reinstatement of Empty Property Rate Relief.

Although local authorities have no direct influence on these measures, local decisions will impact on the viability of High Streets through:

- The introduction of Business Rate Supplements
- Community Infrastructure Levies
- Street parking charges
- Workplace Parking Levies

While levies supporting Business Improvement Districts can also impose burdens, the mechanisms for proposing and approving these involve local businesses so BIDs are only likely to proceed where they address issues of real local concern and where benefits outweigh costs. This sort of business-led solution is the preferred mechanism for raising additional revenue to fund responses to local problems.

Where local authorities are landlords they can support High Street businesses by adopting modern leaseholds including monthly rents and complying with the Leasehold Code. Additional concessions could

help keep key sites occupied during difficult trading conditions or while regeneration projects take effect, and ensure the right mix of retailing and other High Street activities.

Equally importantly, regulation imposes significant additional costs on High Street businesses, with much greater impact on smaller businesses. EU research shows that small businesses such as independent retailers are disproportionately affected by regulatory burdens. On average where a big company spends one euro per employee to comply with a regulatory duty, a medium size business would spend around four euros and a small business up to 10 euros. Most regulation comes from central government, which needs to:

- Immediately reduce the cost of complying with existing regulation, including the removal of any parts disproportionate to the issues they are seeking to address;
- Avoid any new regulations whenever short-term benefits cannot be clearly and objectively shown to substantially exceed short-term costs.

Local authorities working with the Local Better Regulation Office (LBRO) have a major role in ensuring enforcement of regulations does not add unnecessary cost, is consistent, proportionate, targeted and risk-based in accordance with the Hampton principles. This should include:

- Operating Primary, Lead and Home Authority schemes for multiple retailers;
- Offering support to local traders through training and advice where problems are identified or queries raised;
- Ensuring consistent and proportionate enforcement measures are taken, adopting best practice from other local authorities.

In making ageing High Street properties more sustainable it must be acknowledged that businesses in such locations face particular challenges. For example, in implementing essential policies such as the Carbon Reduction Commitment, mechanisms need to be found to support remedial action without unfairly penalising businesses in historic and traditional High Streets.

Case Study

COVENTRY CITY CENTRE'S BUSINESS VITALITY PROGRAMME

THE ISSUE

Supporting new independent businesses opening in Coventry City Centre.

THE INITIATIVE

Between 2004 and 2006 Coventry City Centre Management and CV One Ltd provided direct support to new independent businesses opening in the city centre. It offered direct funding of 50% of

rental costs and the cost of new fascias, together with business support and mentoring. It also offered 25% rental subsidies to existing key specialist businesses to promote their long term retention.

THE OUTCOME

During its operation 19 new independent businesses opened in the city centre. A further eight key specialist businesses already operating in the town were given 25% rental subsidies to promote their long term retention. A total of 144 FTE new jobs were created and the level of void properties fell significantly within the city centre. Customer surveys showed the perception of the range and quality of shops had also improved.

Case Study

SUPPORTING INDEPENDENT RETAILERS IN ROTHERHAM

THE ISSUE

Encouraging retailers to take space in Rotherham town centre.

THE INITIATIVE

There are significant numbers of empty retail properties in the Rotherham metropolitan area. Many of these are in secondary and tertiary areas, although there are a number of larger empty units

in Rotherham's primary shopping area. To help new businesses set up in these vacant units, in a similar scheme to one previously put in place in Coventry, the Borough Council announced earlier this year that independent shops will receive up to 50 per cent of the first year's rent and up to 25 per cent of the second year's rent. Fit-out costs will also be subsidised.

THE OUTCOME

It is too early to gauge the impact this project will have. However, it is clear that approaches like this have the potential to reduce the burden on retailers and make a valuable contribution to the viability of our High Streets.



Case Study

BRIGHTON AND HOVE'S EMERGENCY RECESSION RELIEF

THE ISSUE

Helping Brighton and Hove's businesses with cash flow during the economic downturn.

THE INITIATIVE

Brighton and Hove City Council is introducing a recession relief package which includes:

- Paying small business within 10 days of receipt of a monthly invoice;
- Offering small businesses leasing council property monthly rent payments;
- Giving small businesses the opportunity to pay business rates in 12 annual instalments.

In addition the council is working with the local Chamber of Commerce to bring together local business support organisations.

THE OUTCOME

The Council hopes the initiative will assist local businesses with cash flow so more businesses remain viable during the recession.



CONCLUSIONS

We face a time of great change in our High Streets as the recession bites deeper. Some High Streets may never go back to being the destination of choice for major purchases as nearby regional centres act as magnets, drawing shoppers from an ever-widening catchment area. Others will lose critical footfall to internet shopping. This does not mean High Streets have no future, but it does mean they need to shape a different destiny by meeting customers' ever-changing needs. This might include acting as a centre for other local services, cultural activities and entertainment with essential shops and niche stores flourishing within a broader High Street community.

Other High Streets will flourish once more when the economy returns to growth but need nurturing through this difficult period. Plans for housing and economic growth could bring new opportunities to High Streets which merely ticked over for a generation.

The essential point is that these processes must be actively managed by local authorities in partnership with local retailers, other businesses and residents, taking account of Regional Spatial Plans and sub-regional equivalents.

Great High Streets – High Streets people appreciate and cherish – need to be planned carefully, managed properly and nurtured patiently. Sustainable, focused, strategic management of our town centres should become the norm rather than the exception.

This report has examined six key areas that should be addressed, as a minimum, in this process. It has highlighted examples of good practice in each. Schemes of this sort need to become standard practice.

The High Street can continue to fulfil its role as the heart of a community even as changing economic circumstances and cultural practices alter that remit. But this will not happen by chance. We must invest in our High Streets to secure this future for our communities and recognise that good High Streets, like good retailers, are constantly adapting and responding to customers' needs and preferences.

This document is part of a larger debate. We welcome contributions from everyone with an interest in flourishing communities and High Streets.



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NOTES



BRITISH RETAIL CONSORTIUM

for successful and responsible retailing



The British Retail Consortium (BRC) is the lead trade association for the UK retail sector and the authoritative voice of the industry to policy makers and the media.

We represent the whole range of retailers, from the large multiples and department stores through to independents, selling a wide selection of products through centre of town, out of town, rural and virtual stores.

Retail is one of the UK's success stories, but currently faces a challenging trading and regulatory environment. Our aim is to bring about policy and regulatory changes that will ensure retailers thrive and maintain their outstanding record on creating jobs, product innovation and consumer choice.

OUR VISION

To work with our members to sustain a successful and responsible retail sector.

OUR MISSION

To make life easier for our members by:

- Campaigning to promote and defend retailers' interests
- Advising retailers of threats and opportunities to their business
- Improving the perceptions of retailing in the UK
- Offering members a range of services and products which add value to their business

<http://www.brc.org.uk>

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